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AUTHOR Shepard, Del
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ABSTRACT

This curriculum guide and content outline for the telemarketing specialist contains seven sections: (1) specialized telemarketing tasks; (2) telemarketing selling skills; (3) marketing tasks; (4) business-related tasks; (5) business-specific tasks; (6) personnel/human resources related; and (7) communications and minimum skill tasks. Each section includes an introduction and topics covered, purpose, objective(s), activities, evaluation, resources, content outline, and additional topics. Section 1 covers the following: telephone manners; telemarketing in relation to the firm; personal minimum skills; telephone as a marketing tool; telemarketing trends; training personnel; dimensions; marketing techniques; and telemarketing and marketing mix. Topics in section 2 are as follows: attention techniques; customer relations; customer rapport; product benefits; building rapport; handling objections; closing techniques; and appointments and call backs. In section 3 the following subjects are covered: marketing; consumer and industrial markets; competition; market development; daily calculations/sales; and inventory control. Three topics in section 4 are computer keyboarding, consumer laws, and time management. Section 5 contains the following: consumer credit; credit limits; collection procedures; and market research. Consumer behavior, goal setting, career searches, and job search techniques are dealt with in section 6. Section 7 contains communications and minimum skill tasks. (NLA)

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T E L E M A R K E T I N G

CURRICULUM GUIDES

&

CONTENT OUTLINES

FOR

TELEMARKETING

TELEMARKETING SPECIALIST

DEVELOPED FOR:

DEPARTMENT OF EDUCATION
GRIMES STATE OFFICE BUILDING
DES MOINES, IOWA 50319-0146

SEPTEMBER 1987

DEVELOPED BY:

DR. DEL SHEPARD, ASSISTANT PROFESSOR
MARKETING DEPARTMENT
SCHOOL OF BUSINESS
UNIVERSITY OF NORTHERN IOWA
CEDAR FALLS, IOWA 50614-0126
319-273-2225

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TELEMARKETING

TELEMARKETING SPECIALIST

SPECIALIZED TELEMARKETING TASKS

Within this section there are several topics which are deemed as being highly important to the success of the individual who would be working in a telemarketing specialist position. Topics include:

1. Telephone manners
2. Overview of telemarketing/relation to the firm
3. Personal/minimum skills needed
4. Telephone as a marketing tool (Indicated to be of medium importance, but included in this unit)

OVERVIEW OF TELEMARKETING AND
RELATIONSHIP TO THE FIRM

TELEMARKETING SPECIALIST

SPECIALIZED TELEMARKETING TASKS

PURPOSE: This unit is designed to help participants understand an overview of telemarketing, its relationship to the firm, in which participants work, and the telephone's role as a marketing tool.

OBJECTIVE: Upon completion of this unit, participants will:

* have an awareness of the various functions that are performed by telemarketing

* understand the relationship of telemarketing to other marketing functions of the firm

* be able to explain the various uses of the telephone in telemarketing

ACTIVITIES: Discussion should center around:

* what is telemarketing
* what it can do for the firm
* examples of how telemarketing is used
* what telemarketing cannot do

Have participants list examples of how telemarketing can effectively be used within their own firms.

Discuss the relationship of telemarketing to other marketing functions within the firm, including:

* outside sales functions
* inside sales functions (where applicable)
* advertising
* sales promotion
* customer service
* others

EVALUATION: The participants should be able to identify at least five functions performed by telemarketing within the firm.

The participants should be able to describe the relationship that telemarketing plays with the other marketing functions of the firm.

The participants should be able to list at least ten uses of the telephone in telemarketing and present at least two examples of how the telephone can be used effectively in each category.

RESOURCE: "In-House Telemarketing", Thomas McCafferty, Glen T. Presley Associates, Inc., 1987, pp. 3-19.

"Telephone Marketing"
Available from:
American Sales and Marketing Institute
98 Cutter Mill Road
Great Neck, NY 11021
Price: $2.00 per issue

CONTENT OUTLINE

A. What is Telemarketing?

1. Planned use of the telephone as a selling tool
2. Used along with traditional marketing techniques
3. Must justify its own use in cost savings and effective coverage of sales territory
4. Telemarketing is used for both inbound and outbound calls

B. What Telemarketing Can Do for the Firm

1. Direct selling to customers, both retail and commercial
2. Perform seasonal selling
3. Special promotions
4. Setting appointments for field sales force
5. Reactivating dormant accounts
6. Account management
7. Opening new sales territories
8. Cleaning prospect lists
9. Developing prospect lists
10. Qualifying prospects

11. Generating new leads
12. Backing up field sales force
13. Creating awareness among customers, prospects, and third party influences
14. Collecting overdue accounts
15. Market research
16. Defining markets
17. Positioning and pricing products
18. Refining engineering values or product development
19. Fine-tuning marketing strategies
20. Learning about competition

21. Maintaining customer/shareholder relations
22. Overcoming negative publicity
23. Explaining unusual developments (name change, merger, sales of company, etc.)
24. Order-taking
25. Solving service and parts problems
26. Cross-selling/upgrading
27. Renewing subscriptions
28. Updating records (taking changes of addresses)
29. Supplying information to inquires
30. Qualifying/screening inquires
31. Taking reservations (seminars, entertainment)
32. Tracking advertising/promotion/publicity

C. What Telemarketing Cannot Do

1. Not a solution to all the problems of the company
2. Cannot operate in isolation of other marketing functions
3. Not to be used in every customer contact situation

D. Telemarketing's Relationship to Other Marketing Functions

1. Telemarketing as an extension, but not a replacement, for outside sales
2. Effective use of telemarketing to supplement inside sales efforts
3. Telemarketing used to support advertising function
   a. Check awareness level of the customer to the firm's advertising campaign
   b. Assess the effectiveness of advertising campaign
4. Telemarketing as a follow-up to sales promotion efforts of the company
5. Creating and maintaining effective customer relations through telemarketers

TELEPHONE MANNERS

TELEMARKETING SPECIALIST

SPECIALIZED TELEMARKETING TASKS

PURPOSE: This unit is designed to assist participants in developing professional telephone manners for use in telemarketing.

OBJECTIVE: Upon completion of this unit, participants will:

* have developed professional telephone manners

ACTIVITIES: Identify mannerisms which are distractors over the telephone. Examples include:

* speaking too low to be heard or too loud
* speaking too fast or too slow
* using terminology not understood by the customer
* being discourteous to the customer
* using of slang or vulgarity over the telephone

Discuss the list of distractors developed and identify ways in which to prevent them.

Role play telephone conversations in which the telemarketer is using professional telephone manners. Emphasis should not be placed upon the content of the telephone conversation, but rather upon the mannerisms displayed. Other participants should observe the conversation and give feedback.

EVALUATION: The participants should be able to identify at least ten mannerisms which should be avoided in making telephone calls to customers.
The participants should be able to role play a telephone conversation with a customer and to avoid using any distracting mannerisms during the call.

RESOURCE: "How to Be a Successful Telephone Sales Representative"
Available from:
A Division of American Management Association
135 West 50th Street
New York, NY 10020
"Telephone Courtesy Pays Off"
Available from:
American Media Incorporated
1454 30th Street, Suite 105
West Des Moines, Iowa 50265

Price: 5-day rental for $110; Lease/purchase for $475

CONTENT OUTLINE

A. Professional Telephone Manners

1. The telephone as a medium for contact with the customer
   a. Importance of professional mannerisms over the telephone
   b. First impressions left by the caller
   c. Telephone sales often only have one chance to sell
2. Distractors to effective telephone sales

   a. Speaking too low to be heard or too loud
   b. Speaking too fast or too slow
   c. Using terminology not understood by the customer
   d. Being discourteous to the customer
   e. Using slang or vulgarity over the telephone
   f. Background noise and distractions
   g. Poor grammar and vocabulary
   h. Poor pacing of sales presentation
   i. Lack of preparation
   j. List others

B. Role Playing a Sales Call

1. Have participants work in teams of two to prepare for a role playing situation in which one will be the customer and the other the telemarketer.
2. A short script of the sales call should be prepared in which the telemarketer is to do one or more of the following:
   a. Introduce the customer to their company and the line of products available for sale
   b. Explain a new product available on the market from the telemarketing firm
   c. Explain a new sales promotion campaign being made available to the customer business
   d. Others that may be developed by the instructor
3. Participants may use telephone equipment if available. If none is available, participants may role play their telephone conversation while sitting back to back so that they cannot see each other; or they can be separated by a short partition.
4. Other members of the class should critique the sales call to identify any distracting mannerisms displayed by the telemarketer.
5. Each team should have the opportunity to role play their telephone conversation.
6. Tape recording the telephone conversations may be useful to assessing participant progress.

C. Share with the participants information contained in the publication, "How to Be a Successful Telephone Sales Representative".

D. View the film "Telephone Courtesy Pays Off".

PERSONAL/MINIMUM SKILLS REQUIRED
FOR TELEMARKETING

TELEMARKETING SPECIALIST

SPECIALIZED TELEMARKETING TASKS

PURPOSE: This unit is designed to assist the participants in determining the personal skills needed to be a telemarketer.

OBJECTIVE: Upon completion of this unit, participants will:

* have an awareness of the personal skills needed to be a telemarketer
* have an understanding of whether they possess the minimum skills necessary to be an effective telemarketer

ACTIVITIES: Discuss the general characteristics necessary for any sales position.
Discuss the unique characteristics required of individuals working in the telemarketing field.
Have participants list their own strengths and weaknesses with regard to the characteristics necessary for telephone sales.
Identify personal characteristics necessary for the following:

* Inbound sales
  - Retail customers
  - Commercial customers
* Outbound sales
  - Retail customers
  - Commercial customers
* Collections
* Prospecting
* Others

EVALUATION: The participants should be able to identify the necessary characteristics of an effective telemarketer.

The participants should be able to describe their own skills and areas needing improvement in order to become effective telemarketers.

RESOURCE: "Telephone Marketing"
Available from:
American Sales and Marketing Institute
98 Cutter Mill Road
Great Neck, NY 11021
Price: $2.00 per issue

CONTENT OUTLINE

A. General Characteristics Necessary for Sales

1. Maturity/self-confidence
2. Personal selling skills
3. Cooperativeness
4. Communications/public speaking skills
5. Pleasant disposition
6. Punctuality/dependability
7. Professional mannerisms
8. General marketing skills
9. Extroversion
10. Self-motivation
11. Positive attitude
12. Good judgment
13. Time management ability
14. Persistence/persuasiveness
15. Good customer relations
16. Initiative
17. Integrity

B. Discuss each of the characteristics listed above with regard to success as a telemarketer.

C. All participants should be given paper on which to write their STRENGTHS and WEAKNESSES with regard to the list of characteristics necessary for telephone sales.

1. Have participants look particularly at the various telemarketing functions such as:

   a. Inbound sales
      (1) Retail customers
      (2) Commercial customers
   b. Outbound sales
      (1) Retail customers
      (2) Commercial customers
   c. Account collections
   d. Prospecting for new customers
   e. Others

D. Participants should be able to develop a profile of characteristics which they possess that would be appropriate for each of the telemarketing functions.

1. From this profile they should be better able to determine which telemarketing functions best suites their talents.
2. They should also be able to determine those areas in which they need to improve to become a well-rounded telemarketer.

TELEMARKETING SPECIALIST

SPECIALIZED TELEMARKETING TASKS

Within this section there are several topics which are indicated as having medium importance to the success of an individual working in a telemarketing specialist position. Topics include:

1. Current trends in telemarketing
2. Training telemarketing sales personnel
3. Basic telephone procedures
4. Telephone as a marketing tool (covered in the previous unit)
5. Dimensions of telephone marketing
6. Marketing techniques for telemarketing
7. Telemarketing and marketing mix

CURRENT TRENDS AND DIMENSIONS IN TELEMARKETING

TELEMARKETING SPECIALIST

SPECIALIZED TELEMARKETING TASKS

PURPOSE: This unit is designed to help participants gain an understanding of the dimensions of telephone marketing and the current trends in telemarketing.

OBJECTIVE: Upon completion of this unit, participants will:

* have an awareness of the various dimensions of telephone marketing

* be able to identify current trends that are taking place in the field of telemarketing

ACTIVITIES: Invite guest speaker(s) from local businesses who use telemarketing in their operations. An emphasis should be placed upon the following:

* Overview of the industry--where it is today
* How telemarketing fits into the organization
* Career opportunities in telephone sales
* Uses of telephone marketing services within the firm
* Dimensions of telephone marketing used by business and industry
* Current trends in telemarketing

Several different businesses may be represented to provide a wider variety of insight for the students.

EVALUATION: When given specific examples, the participants should be able to identify where telemarketing fits into an organization. This could be done with the use of case studies.
The participants should be able to identify changes that are taking place in business and industry as a result of telemarketing.
The participants should be able to list at least five current trends in telemarketing.

RESOURCE: "TeleProfessional", the Quarterly Forum for Professionals Doing Business by Phone
Available from:
Del Mar Associates
1049 Camino Del Mar
P.O. Box 123
Del Mar, CA 92014
Price: One year (4 issues) $39.00

TELEMAREKTING TRAINING TECHNIQUES

TELEMARKETING SPECIALIST

SPECIALIZED TELEMARKETING TASKS

PURPOSE: This unit is designed to assist the participants in understanding the content and techniques to be used in providing training to telemarketing sales personnel.

OBJECTIVE: Upon completion of this unit, participants will:

* have an understanding of the content of an effective training program for telemarketing sales personnel

* have an awareness of the training techniques to be used in conducting a training program for telemarketing sales personnel

* be able to demonstrate training techniques to be used in conducting a training program for telemarketing sales personnel

ACTIVITIES: Review topics from the content outline which would be necessary to be included in an effective training program for telemarketing sales personnel. Additional topics may be added as deemed appropriate.

Discuss training techniques that could be used by sales supervisors when conducting a training program for telemarketing sales personnel. Topics contained in the content ouline should be covered, as well as additional topics that would be needed by the participants.

A telemarketing sales supervisor may be invited to the classroom to discuss these topics, or a visit could be made to a training facility to see first hand how training operations are conducted in actual businesses.

The participants should prepare a short training session to demonstrate their understanding of both the content area and training techniques that can be used in a formalized training program. Other participants should role play the part of the trainees. It is suggested that topics be developed by the instructor and that duplication be avoided to increase the effectiveness of the simulated training sessions.

EVALUATION: The participants should be able to identify at least ten topical areas which could be used in the content of an effective training program for telemarketing sales personnel.

The participants should be able to describe at least five training techniques that could be used in providing sales training to telemarketing personnel.

The participants should be able to develop a content outline, utilize at least one training technique, and demonstrate, in a role playing situation, a mini-training session for telemarketing sales personnel.

RESOURCES: "In-House Telemarketing", Thomas McCafferty
Glen T. Presley Associates, Inc., 1987,
pp. 159-184.

"Secrets of Selling"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: $4.75

"How to Be a Successful Telephone Sales Representative" Available from:
AMACOM
A Division of American Management Assoc.
135 West 50th Street
New York, NY 10020

"Selling on the Phone"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: 5-day rental for $110; Lease/Purchase for $475

"90 Telemarketing Skills in 90 Minutes"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: 30-day rental for $195; Lease/Purchase for $695

"The Process of Professional Telemarketing"
Available from:
Glen T. Presley Associates, Inc.
Human Resource Development
21 West 701 Marston
Glen Ellyn, IL 60137

CONTENT OUTLINE

TELEMARKETING SALES PERSONNEL

A. Sales Training Content

1. Use of the telephone; basic telephone procedures
2. Telephone manners
3. Principles of Selling
   a. Prospecting for customers
   b. Qualifying the customer
   c. Pre-approach to the sale
   d. Opening statements to the sales call
   e. Sales presentation methods
   f. Answering questions
   g. Using probing questions
   h. Handling objections
   i. Closing the sale; asking for the order
   j. Follow-up and follow-through

4. Developing a sales script
5. Developing attention-seeking techniques

6. Customer relations
7. Product/Service benefit analysis
8. Dealing with customer complaints
9. Making appointments and call backs
10. Problem-solving techniques

11. Identifying and knowing the competition
12. Developing computer keyboarding skills
13. Understanding credit limits
14. Collecting accounts
15. Developing business vocabulary

16. Listening skills
17. Vocal image
18. Voice techniques
19. Data recording
20. Written sentence structure

21. Communication styles
22. Importance of written and verbal communication skills
23. Basic mathematical skills; i.e. percentages, discounts, fractions, decimals, etc.

B. Training Techniques Used with Telemarketing Sales Personnel

1. Timing of the sales training
   a. Orientation to the job
   b. Initial training requirements
2. Planning sales training sessions
   a. Developing the content
   b. Making training job specific
   c. Training for job advancement
3. Classroom instruction techniques
4. On-the-job training methods
5. Self-paced and home-study training methods

6. Large group, small group, and individualized training programs
7. Role-playing techniques
8. Simulations
9. Use of case studies
10. Evaluation methods in assessing progress

11. Facilitator training; "training the trainer"
12. Feedback and follow-up to the training
13. On-going training requirements vs. one-time training
14. Location of the training sessions
15. Evaluation of training program effectiveness

USING VARIOUS TELEPHONE SYSTEMS AND HANDLING INBOUND AND OUTBOUND CALLS

TELEMARKETING SPECIALIST

SPECIALIZED TELEMARKETING TASKS

PURPOSE: This unit is designed to help participants acquire skills in basic telephone procedures.

OBJECTIVE: Upon completion of this unit, participants will:

* have developed an understanding of various telephone systems available in business
* be familiar with proper procedures for handling inbound telephone calls
* be able to make outbound telephone calls

ACTIVITIES: Discuss procedures to be followed in using each of several different kinds of telephone equipment. Explain the purposes of the various components of the systems and how they function.

Recommend a visit to several different telemarketing firms to observe the use of their telephone equipment in action. Specific attention should be paid to the proper telephone procedures used by TSR's (Telephone Sales Representatives) in making both inbound and outbound calls.

Suggest that students be given the opportunity to experience the process of making inbound telephone calls, by using classroom simulation equipment, equipment located in a college, or equipment located at the business site that is in actual use by telemarketers. Participants should also be given the opportunity to use the equipment in receiving inbound calls.

The length of time spent on this activity will vary depending upon the availability of equipment and the emphasis that is placed upon this topic at this time in the participants' training. The major concern at this point should be to familiarize the participants with the kinds of equipment available and the procedures used to handle inbound and outbound calls.

EVALUATION: The participants should be able to use proper telephone procedures in making both inbound and outbound telephone calls.

The participants should be able to role play a situation in which they must demonstrate the proper techniques in making and receiving calls.

RESOURCE: "Telephone Marketing Techniques", AMACOM, Monograph

Available from:

Donald O. Rod Library
University of Northern Iowa
Cedar Falls, Iowa

MARKETING TECHNIQUES AND THE MAREKETING MIX

TELEMARKETING SPECIALIST

SPECIALIZED TELEMARKETING TASKS

PURPOSE: This unit is designed to provide the participants with insight into the marketing techniques which can be performed through telemarketing and the identification of the marketing mix strategies used by businesses in telemarketing.

OBJECTIVE: Upon completion of this unit, participants will:

* have an understanding of the marketing techniques performed by business
* be able to identify marketing techniques that can be performed through telemarketing
* understand marketing mix strategies used by businesses in telemarketing

ACTIVITIES: Discuss the various marketing techniques and functions performed by businesses that are associated with both products and services.

Identify those marketing techniques that can be performed using the telemarketing function.

Outline strategies used by telemarketing businesses to identify the companys' marketing mix.

EVALUATION: The participants should be able to list the marketing techniques that are performed by both product-oriented and service-oriented businesses and industries.

The participants should be able to describe the marketing techniques performed by both service- and product-oriented business that can be carried out through the telemarketing function of the firm.

When given a specific example, the participants should be able to formulate marketing mix strategies used by businesses in the telemarketing field.

RESOURCES: "Telephone Marketing Techniques"
Available from:
Donald O. Rod Library
University of Northern Iowa
Cedar Falls, Iowa 50614

"Telephone Marketingk"
By Murray Rowen
McGraw-Hill Book Company

CONTENT OUTLINE

A. Marketing Techniques and Functions

1. What is marketing?
2. Identification of channels of distribution
3. Personal sales function
4. Mass selling
   a. Advertising
   b. Publicity
5. Sales Promotion
6. Techniques for product- and service-oriented businesses
7. Market research

B. Marketing Techniques Performed by Telemarketers

1. Customer service
2. Outbound sales to retail customers
3. Outbound sales to commercial customers
4. Inbound sales calls
5. Market research
6. Account collections
7. Customer prospecting

C. Marketing Mix Strategies used by Telemarketing Firms

1. Elements of the marketing mix
   a. Product or service offered for sale
      (1) Identification of customer needs
      (2) Demographic characteristics of the customer
   b. Place - distribution points for products or services
      (1) Availability of the product when the customer needs it and when it is needed
      (2) Time required to deliver products and services
   c. Promotion
      (1) The actual sales presentation to the customer
      (2) Sales promotion materials that support sales
      (3) Advertising campaigns to stimulate demand
      (4) Publicity
   d. Price
      (1) Strategies
      (2) Discounts
      (3) Allowances
      (4) Credit
      (5) Payment plans

SPECIALIZED TELEMARKETING TASKS

Other topics related to the major category of specialized telemarketing tasks could be appropriate to cover if time permits. Topics include:

1. Starting a telemarketing department
2. Selecting telemarketing sales personnel
3. Evaluating of telemarketing sales personnel
4. Contractual telemarketing
5. Reading/understanding/economizing on phone bills

6. Long-term telephone cost reduction
7. Telecommunication management
8. Telecommunication equipment
9. Central office and telephone operations
10. Telephone networks

11. Transmission equipment
12. Microwave radio
13. Satellite communications
14. Fiber optics
15. Telephone management systems

16. Automatic call distributions
17. Telecommunications industry
18. Transmission systems terminology
19. Introduction to telemarketing software
20. Application of telemarketing software

For the purposes of this curriculum guide, only those topics which were indicated to be highly important or of medium importance were included in the curriculum design. Additional topics may be developed in the formulation of the curriculum as deemed appropriate.

TELEMARKETING

TELEMARKETING SPECIALIST

TELEMARKETING SELLING SKILLS

Within this section there are twelve topics which are indicated as being highly important to the success of the individual who would be working in a telemarketing specialists position. Topics include:

1. Attention techniques
2. Customer relations
3. Customer rapport
4. Product benefits
5. Building rapport
6. Handling objections
7. Closing techniques
8. Appointments and call backs

ATTENTION TECHNIQUES

TELEMARKETING SPECIALIST

TELEMARKETING SELLING SKILLS

PURPOSE: This unit is designed to help the participants develop skill building techniques to gain the attention of the customer in a telephone sales situation.

OBJECTIVE: Upon completion of this unit, participants will:

* be able to identify key elements necessary to gain the attention of the customer over the telephone

* be able to demonstrate techniques used in gaining the attention of the customer in a telephone sales situation

ACTIVITIES: Discuss the importance of gaining the attention of the customer in a short amount of time when making a telephone sales call.

Develop attention getting statements to be used by the telemarketer over the phone. Refer to the content outline for more detail.

In a role playing situation, have each participant use at least one of his/her statements to gain the attention of the customer. Have other students in the class critique the effectiveness of the statements and give feedback to the caller.

EVALUATION: The participants should be able to discuss the need for gaining the attention of the customer as quickly as possible in a telephone sales situation.

The participants should be able to develop at least three statements which could be used in an actual telephone sales call.

The participants should be able to demonstrate their ability to make an effective sales call using an attention getting statement to open the call.

RESOURCES: "The Sales Script Book"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: $99.00

"In-House Telemarketing"
Available from:
Glen T. Presley Assoc., Inc.
Human Resource Development
21 West 701 Marston
Glen Ellyn, IL 60137

"90 Telemarketing Skills in 90 Minutes"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: 30-day rental for $195; Lease/Purchase for $695

"Selling on the Phone"
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1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: 5-day rental for $110; Lease/Purchase for $475

"Successful Telephone Selling in the 80's"
by Martin D. Shafiroff & Robert L. Shook
Bames & Nobel Books

CONTENT OUTLINE

A. Attention Getting Techniques

1. Call the customer by name and identify his/her company name.

2. Identify the caller and the name of your company.

3. Tell the customer the "WHY" of your call.

4. Ask questions that will get "YES" responses .

5. Use phrases that are professional--don't talk down.

6. Emphasize the saving of time and money.

7. Stress the benefits of your company/product/service.

8. Make effective use of the customer's time.

B. Development of Telephone Sales Scripts for Getting Attention

1. Outline what is to be said the instant the customer answers the phone.

2. Include customer name, your name, company name, etc.

3. Write the script word for word for practice purposes.

4. Verbally practice the script to be sure it sounds professional.

5. Highlight key words to be used that are attention getters.

6. More practice with the script should allow caller to sound like a professional rather than a person reading the sales presentation to the customer.

C. Role Playing Situation

1. Using developed statements, each participant is to simulate a telephone call to a customer.

2. Another student in the class is to role play the part of the customer, or the instructor can play this part if desired.

3. Students should critique the sales call for the following points:
   a. Professional nature of sales calls
   b. Identification of customer, caller, caller's company
   c. Purpose of the call
   d. Use of key words or phrases to get the customer's attention

CUSTOMER RELATIONS

TELEMARKETING SPECIALIST

TELEMARKETING SELLING SKILLS

PURPOSE: This unit is designed to provide the participants with an understanding of the need for good customer relations and an ability to build effective customer rapport.

OBJECTIVE: Upon completion of this unit, participants will:

* demonstrate an understanding of the need for good customer relations in telemarketing

* demonstrate an ability to build effective customer rapport in a sales situation with a customer

ACTIVITIES: Discuss the need for developing and maintaining good customer relations. Describe techniques used in the development of effective customer relations.
Discuss techniques used in developing a professional rapport with the customer in a telephone sales situation.
In a simulated telephone sales situation, the students should demonstrate their ability to gain the confidence of the customer and to develop a rapport with the customer on a professional level.

A variation of the above simulation might include:

* having the customer call the firm (inbound) with a complaint or concern for a product or service
* having the customer express a desire to receive a personal incentive to purchase the product or service, which is considered unprofessional by the selling company
* having the sales representative make a telephone sales call (outbound) to a customer who has previously had difficulty with the company's product or services

Additional difficult situations can be used to give the student experience in dealing with situations in which they must develop a positive customer relationship. The students must also deal with the establishment of a professional rapport with the customer in a difficult situation.

EVALUATION: The participants should be able to demonstrate an understanding of the need for good customer relations in a telemarketing situation.

The participants should be able to discuss techniques used in developing a professional rapport with the customer in a telephone sales situation.

The participants should be able to demonstrate an ability to build effective customer rapport in a sales situation with a customer.

RESOURCES: "In-House Telemarketing"
Available from:
Glen T. Presley Assoc., Inc.
Human Resource Development
21 West 701 Marston
Glen Ellyn, IL 60137

"90 Telemarketing Skills in 90 Minutes"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: 30-day rental for $195; Lease/Purchase for $695

"Selling on the Phone"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: 5-day rental for $110; Lease/Purchase for $475

"Successful Telephone Selling in the 80's"
by Martin D. Shafiroff & Robert L. Shook
Barnes & Nobel Books

"Non-Manipulative Selling"
by Anthony Alessandra & Phillip Wexler
Available from:
Ruston Publishing Company
Prentice-Hall Company
Englewood Cliff, NH 07632
Price: Hard-cover text - $19.95
Paperback book - $14.95

CONTENT OUTLINE

A. The Need for Customer Relations

1. Sales of products or services over the phone
   a. Apprehension of customers
   b. Mistrust of telephone sales
   c. Image of telemarketing

2. Overcoming difficulties experienced with past sales calls
   a. Handling past problems of the customer with your company first, then making future sales
   b. Understanding customer needs for satisfaction

3. Techniques used in developing good customer relations
   a. Establishing trust in the salesperson
   b. Developing trust in the company
   c. Instilling trust in the products or services

4. Handling more than the sale
   a. Showing concern for delivery of the product or service
   b. Handling questions on follow-up services:
      (1) Warranty
      (2) Product service
      (3) Installation
   c. Financing and credit

B. Developing a Professional Rapport with the Customer

1. Understanding that the customer is ALWAYS RIGHT

2. Professional ethics

3. Using professional sales techniques

4. Honesty is the BEST POLICY

5. Put yourself in the place of the customer--remember the GOLDEN RULE

PRODUCT FEATURES & BENEFITS

TELEMARKETING SPECIALIST

TELEMARKETING SELLING SKILLS

PURPOSE: This unit is designed to assist the participants in conducting product/service analysis to determine the features and benefits to the customer.

OBJECTIVE: Upon completion of this unit, participants will:

* be able to develop an analysis of products or services being sold to the customer, including features and benefits

ACTIVITIES: When given a product or service, the participants will develop an analysis of the features and benefits to the customer. Refer to the content outline for more details.

The product/service analysis should be prepared in written form by the participants and presented to the class verbally or to the instructor as an assignment.

The instructor may choose to assign specific products or services to the students to prevent duplication, or the students may select their own product or service with which they are familiar.

The emphasis should be placed on identifying the features of the product and the benefits to the customer when making the purchase. If the product or service is sold at retail, the benefits should of course be to the ultimate consumer of the product. If, on the other hand, the product or service is to be sold commercially, the benefits should be derived by the firm making the purchase.

EVALUATION: The participants should be able to describe the processes involved in conducting a product/service analysis.

When given a specific example, the participants should be able to demonstrate the ability to carry out a product/service analysis with particular attention being given to the features and benefits to the customer.

RESOURCES: "Secrets of Selling"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: $4.75

"In-House Telemarketing"
Available from:
Glen T. Presley Assoc., Inc.
Human Resource Development
21 West 701 Marston
Glen Ellyn, IL 60137

CONTENT OUTLINE

A. Product/Service Analysis

1. Identify features of the product/service.
2. Research features of competing products/services.
3. Outline unique features of the product/service.
4. Identify extra costs associated with unique features.
5. Identify intangible features associated with product/service.
6. Indicate benefits to the customer when making purchase.
7. List both tangible and intangible benefits.
8. Identify depth and breadth of product/service line.
9. Associate each feature with a benefit to the customer.
10. List strengths and weaknesses of product/service when compared to the competition.

B. Script Statements should be Developed for Each Benefit

1. Statements should be appealing to the customer.
2. Statements should take into consideration the needs of the customer.
3. Features should be mentioned in concise statements with the outcome being of benefit to the customer.
4. Use the problem-solving approach to describe benefits.
5. Remember, the customer is concerned with saving time and money.

HANDLING CUSTOMER OBJECTIONS & COMPLAINTS

TELEMARKETING SPECIALIST

TELEMARKETING SELLING SKILLS

PURPOSE: This unit is designed to assist the participants handle objections and customer complaints.

OBJECTIVE: Upon completion of this unit, participants will:

* be able to identify techniques used in handling customer objections during a sales presentation
* be able to deal with special objections raised by the customer
* be able to handle customer complaints in a professional manner

ACTIVITIES: Discuss techniques that can be used in handling objections raised by the customer during a telephone sales situation. Stressed that the telemarketer should have prepared a list of answers to known objections which are commonly received from customers. In addition, participants must have the ability to "think on their feet" during the sales presentation to deal with objections.

Stress the need to "stick to the script" when talking about the product and to avoid rambling. This many times creates additional questions in the mind of the customer. Sales presentations can always contain unexpected objections which cannot be anticipated by the telephone sales representative. Discuss some of these situations so that the participants are aware of possible problems which might arise.

In small groups, role play the handling of customer objections. Use case studies in which the students are placed in a situation as a telemarketer, having to answer objections raised by the customer during a telephone sales call. One student should role play the part of the salesperson, and the other students collectively can role play the part of the customer.

A variation of this technique would be for students to role play a telephone conversation with a customer, after developing a script of possible responses to objections.

EVALUATION: The participants should be able to describe techniques used in handling expected objections during the sales presentation.

The participants should be aware of methods used in dealing with special objections raised by the customer in a telephone selling situation.

The participants should be able to demonstrate their ability to handle customer objections as a part of a selling situation.

RESOURCES: "Secrets of Selling"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: $4.75

"In-House Telemarketing"
Available from:
Glen T. Presley Assoc., Inc.
Human Resource Development
21 West 701 Marston
Glen Ellyn, IL 60137

"The Sales Script Book"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: $99.00

"90 Telemarketing Skills in 90 Minutes"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: 30-day rental for $195; Lease/Purchase for $695

CONTENT OUTLINE

A. Techniques Used in Handling Customer Objections

1. Never ignore a customer objection--handle objections when they arise.
2. Know the difference between questions and objections.
3. Price--the number one objection--know how to overcome.
4. LISTEN to what the customer is saying.
5. Never assume you understand why they are objecting--ASK.
6. Restate the objection to clarify for the customer.
7. Be assertive not aggressive.
8. Control anger and emotions.
9. Put yourself in the shoes of the customer.
10. Answer the objection to the satisfaction of the customer.
11. Always plan for known objections in sales presentations.
12. Develop script for dealing with usual customer objections.

B. Dealing with Special Objections of the Customer

1. Realize that telephone sales create stress for the customer.
2. Special objections may arise at any time during the sales presentation--many are unique to the customer's situation--if objections cannot be answered on the spot, assure the customer that you will get that information to them as quickly as possible, and do it.
3. Seek advice from supervisor on special cases when needed.

C. Handling Customer Complaints

1. Identify the REAL complaint.
2. Never argue with the customer--remember, the customer is always right, even when they aren't.
3. Find the cause of the complaint.
4. Assure the customer that their complaint will be heard.
5. Restate the complaint for clarity--be sure you understand what the problem is before trying to solve it.
6. Give the customer specific time lines as to when you will get back to them, solve the problem, etc. Vague answers to complaints generate additional concern on the part of the customer.

D. Role Playing Situations

1. Late delivery of a product, causing the loss of customers.
2. Defective product, creating need to return to company.
3. Service personnel not solving problem on installed equipment.
4. Overcharge on account resulting in inaccurate billing.
5. Assessment of late charges on bill already paid.
6. Additional situations can be developed for role playing.

CLOSING TECHNIQUES

TELEMARKETING SPECIALIST

TELEMARKETING SELLING SKILLS

PURPOSE: This unit is designed to help the participants develop closing techniques to the sales call.

OBJECTIVE: Upon completion of this unit, participants will:

* be able to identify techniques to be used in closing the telephone sales call
* be able to demonstrate the ability to close a sales presentation

ACTIVITIES: Discuss the various techniques that can be used to close the sales call. Describe the differences between closing a field sales call and a sales call over the telephone.

In small groups, have the participants develop several closing statements to be used to bring a sales presentation to a close.

In a role playing situation, have students demonstrate their ability to close a sales call over the telephone. Other participants or the instructor can role play the part of the customer.

EVALUATION: The participants should be able to describe at least five techniques to be used in closing the sale.

The participants should be able to develop a script to be used in closing an actual sales situation.

The participants should be able to demonstrate their ability to close the sale in a role playing situation.

RESOURCES: "The Sales Script Book"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: $99.00

"In-House Telemarketing"
Available from:
Glen T. Presley Assoc., Inc.
Human Resource Development
21 West 701 Marston
Glen Ellyn, IL 60137

"90 Telemarketing Skills in 90 Minutes"
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American Media, Inc.
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"Selling on the Phone"
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1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: 5-day rental for $110; Lease/Purchase for $475

"Successful Telephone Selling in the 80's"
by Martin D. Shafiroff & Robert L. Shook
Bames & Nobel Books

"Sales Management: Concepts and Cases"
by Douglas J. Dalrymple
John Wiley & Sons Publishers
Second Edition, 1985

CONTENT OUTLINE

A. Techniques Used in Closing the Sale

1. Trial closes.

2. Closing the sale doesn't always come at the end of the the sales presentation--listen to the customer for clues to his/her readiness to buy.

3. ASKING FOR THE ORDER--sales are not usually made without the salesperson asking the customer to buy.

4. Using the credit or cash approach to closing.

5. Closing by asking how many, what color, what size, etc.

6. Closing by asking when they want it delivered, or where.

7. Realizing that if one closing attempt doesn't work, another might--go back to the sales presentation, ask questions, and try again.

8. Sales calls that don't close with a sale generally don't get a second chance.

9. Being assertive in asking for the order.

10. Using the direct and indirect approach to closing the sale.

11. Other techniques:

    a. Alternative choice
    b. Summary close
    c. Minor decision
    d. Assumption close
    e. Continuous yes close
    f. Special concession close
    g. Standing room only

APPOINTMENTS & CALL BACKS

TELEMARKETING SPECIALIST

TELEMARKETING SELLING SKILLS

PURPOSE: This unit is designed to help the participants develop skills in making appointments and call backs.

OBJECTIVE: Upon completion of this unit, participants will:

* be able to demonstrate their ability to make appointments by telephone

* be able to demonstrate their ability to make call backs to customers

ACTIVITIES: Discuss the need for making appointments with customers when it is not appropriate to talk with them at the time of the original telephone call. Describe other times when it is more effective to make an appointment for a telephone sales situation than making a cold call on a customer.
Have students practice making appointments over the telephone, making sure that they give the customer adequate information concerning the caller's intentions, time of the call, etc.

Discuss the need for call backs in some selling situations; i.e., customer is unavailable to talk at the time of the call, the call is interrupted by other business of the customer, additional information is needed to make a more effective sales presentation, etc.
Have participants demonstrate their ability to both set up and make call backs to customers. Other students can role play the part of the customer.

EVALUATION: The participants should be able to describe various situations in which it is necessary to make an appointment for a telephone sales presentation.

The participants should be able to demonstrate their ability to make telephone sales call appointments.
The participants should be able to identify situations in which call backs are necessary in telephone sales.

The participatns should be able to demonstrate their ability to make effective call backs to customers.

RESOURCES: "The Sales Script Book"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: $99.00

"In-House Telemarketing"
Available from:
Glen T. Presley Assoc., Inc.
Human Resource Development
21 West 701 Marston
Glen Ellyn, IL 60137

"90 Telemarketing Skills in 90 Minutes"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: 30-day rental for $195; Lease/Purchase for $695

"Selling on the Phone"
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West Des Moines, Iowa 50265
Price: 5-day rental for $110; Lease/Purchase for $475

"Successful Telephone Selling in the 80's"
by Martin D. Shafiroff & Robert L. Shook
Barnes & Nobel Books

"Sales Management: Concepts and Cases"
by Douglas J. Dalrymple
John Wiley & Sons Publishers
Second Edition, 1985

CONTENT OUTLINE

A. Making Telephone Sales Call Appointments

1. Identify the caller, their company, and the purpose of the call.
2. Find the right person for the sales appointment--saves the salesperson's time, but more importantly, saves the customer's time.
3. Set the appointment at the convenience of the customer.
4. Identify any special information that the customer may need prior to the sales call.
5. Ask if anyone else should be included in the sales call from the customer's company.
6. If sales call is to take place in the distant future, a follow-up notice is helpful, along with any literature available to inform the customer of the product or service.
7. Situations in which there is a need to make appointments for sales calls instead of making cold calls:
   a. When it is not appropriate to talk with customer at the time of the original telephone call.
   b. When cold calls are not appropriate.
   c. When the customer is out of town.
   d. When the customer requests another time.

B. Making Effective Call Backs

1. Call backs are used when the sales call cannot be completed immediately.
2. Use call backs to reach the right person.
3. Call backs are necessary when additional information must be obtained for the customer; i.e., price quotes on special orders, delivery deadlines, specifications on bids for projects, etc.
4. Call backs are appropriate when the customer has experienced several interruptions to the sales call:
   a. Some risk is involved in that the customer may not agree to a call back and may be allowing the interruptions to delay the sales presentation.
   b. The risk is worth it if the customer agrees to the call back because it allows for a schedule at a more convenient time.
5. Call backs are made to customer inquires for information:
   a. Develop an attitude that the customer wants something you have to sell, but you still must make the sale.
   b. Don't make the customer feel you are doing them a favor by returning their call.
   c. Call backs should be prompt and should include the correct information the customer requested.

TELEMARKETING

TELEMARKETING SPECIALIST

TELEMARKETING SELLING SKILLS

Within this section there are nine topics which are indicated as being of medium importance to the success of the individual who would be working in a telemarketing specialist position. Topics include:

1. Presentation outline development
2. Team presentations
3. Special objections/complaint techniques (included in the previous section under "Handling Objections")
4. Professional, vocal, image techniques
5. Problem/solution (responding to customer questions/ needs)
6. Telemarketing's relationship to other media
7. Telemarketing - customer and product knowledge
8. Telemarketing - approaching customers/presenting merchandise
9. How to prospect

PRESENTATION OUTLINE DEVELOPMENT

TELEMARKETING SPECIALIST

TELEMARKETING SELLING SKILLS

PURPOSE: This unit is designed to give the participants an understanding and skill in developing an outline for presentation of information to a customer.

OBJECTIVE: Upon completion of this unit, participants will:

* understand the basic elements that are contained in a presentation outline
* be able to develop an outline for presentation to a customer

ACTIVITIES: Discuss the basic elements that should be contained in a outline to be used for presentation to a customer. Include a discussion of the various types of presentation formats and their applications.

Each participant should either choose or be assigned a topic which will be used to develop an outline for presentation to a customer. The basic elements that were discussed above should be included in this assignment. These outlines should be shared with other members of the class.

Participants may be asked to actually give a brief presentation to the class using the outlines that have been developed in this unit.

EVALUATION: The participants should be able to describe the basic elements contained in a presentation outline.

The participants should be able to demonstrate their ability to develop a presentation outline that could be given to a customer in a sales situation.

RESOURCES:

"In-House Telemarketing"
Available from:
Glen T. Presley Assoc., Inc.
Human Resource Development
21 West 701 Marston
Glen Ellyn, IL 60137

"The Process of Professional Telemarketing"
Available from:
Glen T. Presley Assoc., Inc.
Human Resource Development
21 West 701 Marston
Glen Ellyn, IL 60137

"Successful Telemarketing"
by Bob Stone & John Wyman
NTC Business Books

CONTENT OUTLINE

A. Basic Elements of a Presentation Outline

1. Products or services to be presented

2. Customer profile information (demographics)

3. Develop an outline format:
   a. Include key features and benefits of product/service.
   b. Develop script to be used in each segment of the outline.
   c. Make reference to materials that can be used as support information during the presentation.
   d. Highlight key words that are considered a MUST to be used during the presentation.

6. Make space available to record the time, date, etc. of the presentation for later reference.

7. Each major heading should be presented separately:
   a. Subtopics should detail the information to be presented.
   b. Make notes that would summarize each major topic.

8. Outline should also contain a timeline of how long each topic should take to cover--this helps in staying on target with the presentation.

9. If other people are to be involved in making the presentation, identify who they are: name, job title, etc., and indicate in the margin of the outline when they are to speak.

B. Preparing a Presentation Outline

1. Assign participants a topic or have them develop their own.

2. Outlines should be printed or typed for clarity.

3. Outlines should be handed in as an assignment.

4. The information contained within each outline may be presented by the participant to the remainder of the class.

5. The emphasis should be on the preparation of the presentation outline, and not necessarily on the actual presentation by the students.

TEAM PRESENTATIONS

TELEMARKETING SPECIALIST

TELEMARKETING SELLING SKILLS

PURPOSE: This unit is designed to give the participants an understanding and skill in making team selling presentations to customers.

OBJECTIVE: Upon the completion of this unit, participants will:

* be able to identify when and where the use of team sales presentations is appropriate
* demonstrate an ability to make team presentations

ACTIVITIES: Discuss when and where the use of a team approach to selling is appropriate.
Discuss the process of making team sales in a telemarketing situation.

In small groups, have participants develop a brief sales presentation for delivery as a team. Each team should deliver its sales presentation to the remainder of the class, to one student role playing the part of the customer, or to the instructor. All other participants should critique the team sales presentation for effectiveness.

EVALUATION: The participants should be able to identify when and where the use of team sales presentations is appropriate.

The participants should be able to demonstrate their ability to develop and deliver a team sales presentation.

RESOURCES: "Secrets of Selling"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: $4.75

"In-House Telemarketing"
Available from:
Glen T. Presley Assoc., Inc.
Human Resource Development
21 West 701 Marston
Glen Ellyn, IL 60137

CONTENT OUTLINE

A. When to Use Team Presentations

1. When the expertise of one salesperson is not adequate to make the entire presentation effectively.

2. When the customer has several buying influencers that will be present for the sales presentation and varying levels of expertise is required to address all involved.

3. When time can be saved by having several presenters at one time rather than having several separate presentations over a longer period of time.

4. When the customer requests input from several different sources, rather than just one salesperson.

B. Process of Team Presentation

1. Realize the customer doesn't like to be outnumbered:
   a. Be careful not to overwhelm the customer with team members.
   b. Be sure the customer is aware that a team sales presentation is going to be made.

2. Each team member should have a specific role to play:
   a. Observers should be limited as they only add to potential confusion in the selling process.
   b. Timing of the sales presentation should include an adequate amount of time for each salesperson to speak.
   c. Salespeople should concentrate on their own areas of expertise, but should be familiar with each others topics and how they should all fit together.

3. The sales presentation must flow smoothly for the customer:
   a. It MUST be rehearsed beforehand to smooth any rough places and to ensure the timing is correct.
   b. Materials to be used in the presentation must be available to the customer in advance if the sales presentation is to be completed entirely by telephone.

Process of Team Presentation (Continued)

4. The sales presentation should be formatted to include all of the essential elements of an effective sales call:
   a. Pre-approach to the sale; background of the customer; qualifying the buyer, etc.
   b. Approach to the sale; generally with appointment when given over the telephone; using conference call techniques
   c. Actual sales presentation
   d. Handling customer questions and objections
   e. Product presentation
   f. Closing the sale
   g. Follow-up and follow-through

PROFESSIONAL IMAGE

TELEMARKETING SPECIALIST

TELEMARKEING SELLING SKILLS

PURPOSE: This unit is designed to provide the participants with skills to develop professional image and vocal image techniques in telephone sales calls.

OBJECTIVE: Upon the completion of this unit, participants will:

* be able to identify techniques used in developing professional image in telephone sales

* be able to demonstrate their ability to use vocal image techniques in telephone sales calls

ACTIVITIES: Discuss the need to develop a professional image over the telephone to the customer. Stress the importance of this image as a representative of the company, and the dependance upon verbal communications as the sole means of creating a professional image in the mind of the customer.

Identify techniques to be used in developing a professional image over the telephone to the customer.

Discuss the importance of making effective use of vocal image techniques over the telephone.

Invite a guest speaker to discuss these topics. This person should be very familiar with telemarketing and the need for professional image and voice image techniques.

Students should be required to demonstrate their ability to project a professional image over the telephone in a role playing situation. Voice image techniques should also be demonstrated by the students.

EVALUATION: The participants should be able to identify techniques used in developing professional image in telephone sales.

The participants should be able to demonstrate their ability to use vocal image techniques in telephone sales calls.

RESOURCES: "90 Telemarketing Skills in 90 Minutes"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: 30-day rental for $195; Lease/Purchase for $695

"Selling on the Phone"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: 5-day rental for $110; Lease/Purchase for $475

"Successful Telephone Selling in the 80's"
by Martin D. Shafiroff & Robert L. Shook
Bames & Nobel Books

"NLSP: The Hidden Advantage"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: 5-day rental for $130; Lease/Purchase for $595

CONTENT OUTLINE

A. Developing a Professional Image Over the Telephone

1. Customers react more positively to professional sales presentations.

2. The image you project over the telephone says a great deal about you, your company, and your product.

3. What makes up a professional image:
   a. The vocabulary used by the salesperson
   b. Understanding of the customers and their needs
   c. Ability to relate to the customers' problems
   d. Reliance upon the customers' expertise; not assuming they don't know about your company and your products
   e. Maintaining control of the situation
   f. Using professional sales techniques
   g. Being prepared to make the sales presentation
   h. Presenting information in a logical manner
   i. Summarizing presentation
   j. Closing the sale--asking for the order
   k. Providing follow-up

B. Developing Your Vocal Image Over the Telephone

1. The words you use and the way you use them create an image for the caller.

2. Tone of voice

3. Pacing of the phone call--match the speed of the caller's voice

4. Avoid slang, unfamiliar terminology (found within your own organization only), vulgarity, etc.

5. Maintain voice control when things get tense

6. Use variations in the pitch of your voice

7. Display enthusiasm when appropriate

8. Pronounce words correctly and clearly

9. Speak at the same level of understanding as the customers; i.e., don't speak over their heads, down to them, etc.

10. Use complimentary phrases appropriately

PROBLEM SOLVING TECHNIQUES

TELEMARKETING SPECIALIST

TELEMARKETING SELLING SKILLS

PURPOSE: This unit is designed to assist the participants in developing problem solving techniques in respong to customer's questions and needs.

OBJECTIVE: Upon completion of this unit, participants will:

* be able to identify techniques used in solving customer problems and in responding to the customer's questions and needs

ACTIVITIES: Discuss techniques that can be used to solve problems identified by the customer. Stress the need to realize that in many situations the customer may not be aware he/she has a problem. The sales-person is responsible for assisting the customer in identifying needs that can be solved by the company's products.

Describe techniques that should be used when responding to questions raised by the customer during the sales presentation. Refer to the content outline for topics that should be covered in this unit.

Using a case study approach, assign students to prepare responses to a situation in which the customer has an identified problem in his/her business operation. Have the students first outline how they would handle the problem, and then develop a script to be used in their sales presentation over the phone.

Prepare a list of questions typically asked by the customer in a sales situation and ask participants to develop a response to each question. This may be done individually or in small groups. Responses should be shared with other members of the class.

EVALUATION: The participants should be able to describe techniques used to solving problems of the customer as they would occur during a sales presentation. The emphasis should be placed on the identification of needs.

The participants should be able to demonstrate their ability to respond to questions posed by the customer in a telephone sales situation.

RESOURCES: "The Sales Script Book"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: $99.00

"Secrets of Selling"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: $4.75

"Telemarketing Campaigns That Work"
By Murray Roman
Available from:
McGraw-Hill Book Company
1221 Avenue of the Americas
New York, NY 10020

"90 Telemarketing Skills in 90 Minutes"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: 30-day rental for $195; Lease/Purchase for $695

CONTENT OUTLIINE

A. Problem-Solving Techniqes

1. Listen to what is being said.
2. Never assume you know what the problem is without hearing all the facts.
3. Restate what you heard the customer say.
4. Clarify points that may cause confusion--get feedback.
5. List items that relate to the perceived problem.
6. Outline possible solutions to elements of the problem.
7. Offer alternative solutions.
8. Describe risks (costs) that may be involved with each alternative.
9. Allow the customer time to think--use pausing.
10. Ask the customer for his/her decision on a resolution to a problem.
11. Keep personal bias and opinion out of the picture.

B. Identification of Customer Needs

1. Realize that customer needs can be rational or irrational.
2. Outline emotional buying motives.
3. When in doubt, ask questions--don't assume you understand the what, why, where, when, and how of customer needs.
4. Offer several alternatives to meet the customer's needs--don't overwhelm with information.
5. Ask probing questions to be sure you have the right product/service to satisfy the customer's needs.

CONTENT OUTLINE (Continued)

C. Handling Customer Questions in Sales Presentations

1. Never put off a question raised by the customer.

2. If a question will be answered shortly in the sales presentation explain so to the customer; then be sure you do answer.

3. Treat each question as though it is the most important.

4. Realize that customers cannot concentrate on new information until their questions are answered adequately.

5. Be sure the customer understands your answer before you proceed with the sales presentation.

6. Welcome questions; they show the customer is interested.

7. Be sure all questions have been answered before attempting to close the sale.

8. If questions cannot be answered on the spot, respond to the customer ASAP.

RELATIONSHIPS OF TELEMARKETING TO OTHER MEDIA

TELEMARKETING SPECIALIST

TELEMARKETING SELLING SKILLS

PURPOSE: This unit is designed to assist the participants understand the relationship of telemarketing to other forms of media used by the company.

OBJECTIVE: Upon the completion of this unit, participants will:

* be able to describe the relationship telemarketing plays in the company with regard to other forms of media

ACTIVITIES: Discuss other forms of media used by typical companies and the relationship that telemarketing plays in the total marketing mix of the company. Stress the major differences among the various forms of media and the unique characteristics of telemarketing.

EVALUATION: The participants should be able to describe the relationship of telemarketing to other forms of media used by typical companies.

RESOURCES:

"How to Market by Telephone"
Available from:
AMACOM
A Division of American Management Assoc.
135 West 50th Street
New York, NY 10020

"Telephone Marketing"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: $2.00 per issue

"Communication News Journal"
Available from:
Communication News
Box 610
Duluth, MN 55806-9876
Price: $27.00 per year

CONTENT OUTLINE

A. Other Forms of Media Used by Companies

1. Stress the concept that telemarketing is only one of several forms of media used by the company

2. Personal selling

   a. Telemarketing
   b. Face-to-face field sales

3. Sales Promotion tools

   a. Sales literature
   b. Catalogs
   c. Proposals
   d. Direct mailings

4. Advertising

   a. Magazine
   b. Newspaper
   c. Radio
   d. Television
   e. Billboards

5. Publicity

CUSTOMER & PRODUCT KNOWLEDGE

TELEMARKETING SPECIALIST

TELEMARKEING SELLING SKILLS

PURPOSE: This unit is designed to assist the participants in developing telemarketing customer and product knowledge in telephone sales calls.

OBJECTIVE: Upon the completion of this unit, participants will:

* have an understanding for the need to develop complete knowledge of their customers in making telephone sales calls.

* have the ability to develop a profile of a product to demonstrate product knowledge

ACTIVITIES: Discuss the importance of developing background information on customers to improve sales effectiveness. Stress the need to research each customer so that the salesperson has a complete profile of the customer before making the telephone sales call. Outline the kinds of information that are essential in developing customer knowledge prior to sales calls.

Present participants with the names of local businesses and have them develop a profile of the business as though they were going to make a telephone sales call on them.

Along with the need to develop customer knowledge, the telephone sales respresentative must be able to develop adequate product knowledge. At this point, reference should be made to the unit of instruction contained in this section with regard to conducting product/service analysis. If this unit of instruction has not been covered by this point, it should be completed at this time.

EVALUATION: The participants should have completed the unit of instruction contained in this section with regard to conducting product/service analysis.
The participants should be able to complete a profile of a business with the intent of developing customer knowledge to be used in making a sales presentation.

RESOURCES: "Secrets of Selling"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: $4.75

"In-House Telemarketing"
Available from:
Glen T. Presley Assoc., Inc.
Human Resource Development
21 West 701 Marston
Glen Ellyn, IL 60137

CONTENT OUTLINE

A. Sources Used in Developing Customer Knowledge

1. In-house sources of information
   a. Prospect listings
   b. Current accounts
   c. Inactive account files
   d. Secondary marketing research documents
2. Trade Associations Directories
3. Encyclopedia of Associations
4. Governmental Agencies
5. Standard & Poor's Register
6. Dun and Bradstreet
7. Standard Industrial Classification

B. Customer Knowledge Needed if You Sell Business-To-Business

1. Company name, account number and Standard Industrial Classification code
2. Mailing address
3. Shipping address, if different
4. Number of locations
5. Complete phone number
6. Names of buyers by product line
7. Names of assistant buyers or secretaries by product line
8. Names of product specifiers in the case of engineered products
9. Third party influencers, if applicable
10. Annual volume of purchases of your products
11. Maximum potential annual volume of purchases
12. Credit rating and history
13. Other suppliers used by the company
14. Primary competitor of this account
15. Terms and conditions of sale
16. Pricing schedule or discounts available
17. Primary contact at your company
18. Client's normal order/reorder cycle
19. Reason account was sold initially, where applicable
20. Date of last sale
21. Size of last sale and average sale size
22. Customer's gross sales or other measures of size
23. Number of employees
24. Others as deemed appropriate

C. Customer Knowledge Needed if You Sell To Ultimate Consumer

1. Name/occupation
2. Spouse's name/occupation
3. Address
4. Complete phone number
5. Demographics (available from census tract computer tapes)
   a. Gender
   b. National origin (computer programs that can classify individuals based on the national origin of their last names)
   c. Age
   d. Marital status
   e. Income or net worth bracket
   f. Number and type of cars
   g. Neighborhood classification
   h. Affiliations
   i. Dependents
   j. Politics
6. Psychographics
   a. Hobbies
   b. Likes and dislikes
   c. Clubs and other memberships
7. Credit worthiness
8. Buying habits (credit vs. cash)
9. Sales potential for your products/services
10. Others as deemed appropriate

OPENING THE SALE & PRESENTING MERCHANDISE

TELEMARKETING SPECIALIST

TELEMARKETING SELLING SKILLS

PURPOSE: This unit is designed to assist the participants develop skills for approaching the customer over the telephone and for presenting merchandise (products and/or service) to the customer.

OBJECTIVE: Upon completion of this unit, participants will:

* be able to demonstrate their ability to approach (open the sale) the customer over the telephone

* be able to effectively present the merchandise to the customer in a telephone sales situation

ACTIVITIES: Outline techniques that can be used in approaching the customer. Stress the importance of identifying a need the customer has which can be satisfied by the company's products or services.

At this point, reference should be made to the unit of instruction contained in this section regarding attention techniques. If this unit has not been completed at this point, the participants should be directed to do so prior to proceeding with this unit.

Discuss steps that should be taken prior to the sales call to prepare for the opening of the sales call. Refer to the unit of instruction in this section with regard to the development of customer knowledge. If this unit of instruction has not been completed, have the students do so before proceeding.

Outline methods of product presentation that can be used over the telephone. Stress the difference between the product demonstration techniques used in face-to-face sales situations and those that must be used by the telephone sales representative.

ACTIVITIES: (Continued)

Have the participants prepare several opening statements that can be used in telephone sales presentations. These should be shared with the other participants in the class. The instructor should have each student role play these opening statements for practice.

When given a product/service, participants should develop a step-by-step sales presentation for use in a telephone sales situation. This merchandise presentation should be given in front of the class and can be used as a part of an entire sales presentation which should incorporate all of the selling skills covered in the class.

RESOURCES: "Secrets of Selling"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: $4.75

"In-House Telemarketing"
Available from:
Glen T. Presley Assoc., Inc.
Human Resource Development
21 West 7011 Marston
Glen Ellyn, IL 60137

"The Sales Script Book"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: $99.00

"90 Telemarketing Skills in 90 Minutes"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: 30-day rental for $195; Lease/Purchase for $695

CONTENT OUTLINE

A. Opening the Sale

1. Introduce the salesperson.

2. Introduce the company.

3. Introduce the purpose for the call.

4. Identify the customer by name--be sure you have the right person on the phone.

5. Give some other identifying information about the customer, i.e., address, company name, type of business, etc.

6. Be considerate of the customer's time--ask if he/she have time to spend with you.

7. Stress the importance of your call and the product or service to the customer's business.

8. Use professional mannerisms.

9. Use attention getting techniques.

10. Get right to the point--realize that you only have seconds to get and hold the attention of the customer.

B. Presentation of Merchandise Over the Telephone

1. Describe the differences between selling in person and selling over the telephone with regard to merchandise.

2. Techniques used in presenting merchandise:
   a. Must use descriptive terms.
   b. Cover product features and benefits more thoroughly.
   c. Create a visual image of the product for the customer.
   d. Identify a need for the product.
   e. Back up presentation with literature, samples, etc.
   f. Be sure the customer is familiar with the product.

PROSPECTING FOR CUSTOMERS

TELEMARKETING SPECIALIST

TELEMARKETING SELLING SKILLS

PURPOSE: This unit is designed to provide the participants with the ability to prospect for customers.

OBJECTIVE: Upon the completion of this unit, participants will:

* be able to identify techniques used in prospecting for potential customers

* be able to describe sources of information used in prospecting for customers

ACTIVITIES: Discuss the importance of continually prospecting for new customers.

Identify techniqes that are used in prospecting for potential customers.

Describe sources of information that are used in prospecting for customers.

EVALUATION: The participants should be able to list at least five techniques used in prospecting for potential customers and to descibe the importance of prospecting on a continuous basis for new customers.

The participants should be able to describe at least ten sources of information that can be used in prospecting for new customers.

RESOURCES: "How to Market by Telephone"
Available from:
AMACOM
A Division of American Management Assoc.
135 West 50th Street
New York, NY 10020

"Telephone Marketing"
Available from:
American Media, Inc.
1454 30th Street, Suite 105
West Des Moines, Iowa 50265
Price: $2.00 per issue

CONTENT OUTLINE

A. Prospecting

1. 70% of the success of telemarketers is in the quality of the prospect lists that are used.

2. Two basic types of lists:
   a. Compiled - lists of names taken from secondary sources such a phone book, census data, etc.
   b. Responsive - lists of names of individuals that have responded in one way or another to some promotion

3. Stress the importance of good prospect lists be used and/or developed:
   a. Poor lists waste time of telemarketers.
   b. Poor lists tend to reach the wrong people, causing poor public image for the company and telemarketing.

B. Sources of Prospects

1. Reference should be made to the unit discussed earlier, "Developing Telemarketing Customers".
2. Other sources of prospect lists should also be identified.

C. Techniques for Prospecting

1. Sources of prospect names and related information must be acquired:
   a. Some lists are generated in-house.
   b. Other lists are purchased from outside firms.

2. The list should be spot checked for accuracy.
3. Once the list has been determined to be valid, it should be used systematically to insure complete usage.

4. When a prospect is called, notations should be made concerning the outcome of the sales call:
   a. Those customers that responded with a complete "NO".
   b. Those that wanted additional information.
   c. Those that indicated some interest but did not purchase at this time.
   d. Those that purchased at this time.
   e. Others

5. As prospects are contacted, additional prospects may be developed as referrals from satisfied customers.

6. Prospecting is a constant process:
   a. Some companies who sell on a one-time basis are especially in need of good prospects and plenty of them.
   b. With repeat buyers, it is also necessary to continue to develop new prospects to cover loss in customers.

TELEMARKETING

TELEMARKETING SPECIALIST

TELEMARKETING SELLING SKILLS

The topic of "Sales Territory Management", which is related to the major category of telemarketing selling skills, would be appropriate to cover if time permits.

For purposes of this curriculum guide, only those topics which were indicated to be highly important or of medium importance were included in the curriculum design. Additional topics may be developed in the curriculum as deemed appropriate.

TELEMARKETING

TELEMARKETING SPECIALIST

MARKETING TASKS

Within this section there were no topics that were indicated as being highly important to the success of the person working as a telemarketing specialist. There were, however, six topics that were deemed as being of medium importance. They are as follow:

1. Basic understanding of marketing
2. Consumer and industrial markets
3. Know your competition
4. Market development
5. Daily calculations/sales
6. Inventory control

BASIC ELEMENTS OF MARKETING

TELEMARKETING SPECIALIST

MARKETING TASKS

PURPOSE: This unit is designed to assist the participants in understanding the basic elements of marketing.

OBJECTIVE: Upon completion of this unit, participants will:

* be able to identify the basic elements of marketing

* be able to describe each of the basic elements of marketing

ACTIVITIES: Discuss the material contained in the content outline provided. Use practical examples to demonstrate each element as it relates to the business operation of a telemaketing firm.

EVALUATION: The participants should be able to identify the basic elements of marketing.

The participants should be able to describe each of the basic elements of marketing.

RESOURCE:

"Telephone Marketing"
Available from:
DMMA Telephone Marketing Council
6 East 43rd Street
New York, NY 10017

"Telephone Marketing"
by Reuben H. Donnelley
Available from:
Reuben H. Donnelley Corporation
825 3rd Avenue
New York, NY 10022

"Basic Marketing", E. Jerome McCarthy and William D. Perreault, Jr.
Ninth Edition, 1987
Irwin Publishers

CONTENT OUTLINE

A. Marketing's Role in Society

1. Marketing defined
2. How marketing relates to production
3. Micro-marketing and macro-marketing

B. Marketing's Role in the Organization

1. The marketing concept defined
2. Marketing strategy planning
3. The marketing-oriented strategy in target marketing
4. Developing the marketing mix
5. The marketing plan
6. Marketing segmentation

C. Demographics of the U.S. Population

1. Population changes
2. Where the money is located; income levels
3. Consumer spending patterns

D. Customer Buying Motives

1. Consumer buying habits
2. Psychological influences in buying
3. Social influences affecting purchasing

E. Product Planning

1. Differences between products and services
2. Consumer product classes
3. Industrial product classes

F. Distribution Systems

1. Direct channels of distribution
2. Indirect channels
3. Channel management

G. Retailing

H. Wholesaling

I. Promotion

J. Personal Selling

K. Mass Selling

L. Pricing Objectives and Policies

CONSUMER & INDUSTRIAL MARKETS

TELEMARKETING SPECIALIST

MARKETING TASKS

PURPOSE: This unit is designed to give participants an understanding of consumer and industrial markets.

OBJECTIVES: Upon the completion of this unit, participants will:

* be able to describe elements of the consumer and industrial markets

* be able to distinquish the difference between consumer and industrial markets

ACTIVITIES: Discuss the topics contained in the content outline provided. Ask students to develop a list of markets that represent groups of consumer and industrial buyers.

RESOURCES: "Basic Marketing", E. Jerome McCarthy and William D. Perreault, Jr.
Ninth Edition, 1987
Irwin Publishers

"Marketing", Berkowitz, Kerin, and Redelius
Times Mirror/Mosby College Publishing
St. Louis, 1986

"Marketing: Basic Concepts and Decisions"
by William M. Pride and O. C. Ferrell
Houghton Mifflin Company, 1987

CONTENT OUTLINE

A. Consumer Markets

1. Identification of demographic characteristics
2. Consumer buying motives
3. Decision making process
4. Person-specific influences
5. Postpurchase evaluation

6. Psychological influences
7. Social influences
8. Product classifications
9. Consumer protection laws and regulations

10. Sales promotion methods
11. Personal selling techniques
12. Push and pull strategies
13. Market segmentation and target marketing

B. Industrial Markets

1. Industrial buying behavior
2. The professional buyer
3. Industrial distribution channels
4. Pricing strategies and policies
5. Segmentation variables

6. Industrial product classifications
   a. Raw materials
   b. Major equipment
   c. Component parts
   d. Process materials
   e. Supplies
   f. Services

7. Selection and analysis of industrial target markets

8. Standard Industrial Classification (SIC)

9. Locating industrial customers

10. Estimating purchase potential (sales forecasting)

DEALING WITH THE COMPETITION

TELEMARKETING SPECIALIST

MARKETING TASKS

PURPOSE: This unit is designed to assist the participants in identifying the competition and dealing with competition in a telemarketing situation.

OBJECTIVE: Upon completion of this unit, participants will:

* be able to identify the competition for products/services sold by their company
* be able to describe techniques to be used in dealing with competition

ACTIVITIES: Discuss the importance of knowing the competition in any business setting but particularly when working in the field of sales. Identify methods that can be used to determine the competition in a business setting.
Describe techniques that can be used to deal with the competition.
Give the participants product categories or the business type and have them identify other products or firms that are in direct competition.

EVALUATION: The participants will be able to identify their competition for products/services of various businesses.

The participants will be able to describe various techniques that can be used to deal with the competition in a telemarketing situation.

RESOURCES: "How to Be a Successful Telephone Sales Representative"
Available from:
AMACOM
A Division of American Management Association
135 West 50th Street
New York, NY 10020

"Selling Today: A Personal Approach"
by Gerald I. Manning and Barry I. Reece
Third Edition, 1986
Wm. C. Brown Company Publishers
Dubuque, Iowa

CONTENT OUTLINE

A. Competition

1. Basic to free enterprise system in America
2. Price competition
3. Nonprice competition
4. Always know your competition--your customer does
5. Realize that competition is healthy for business

B. Methods for Identifying the Competition

1. Check resources used in prospecting for new customers to identify competition
2. Know your competition
   a. Their size, location, number of branches
   b. Their product/service depth and breadth
   c. Their pricing strategies
   d. Size of their sales force
   e. Features and benefits of products/services
3. Complete a product/analysis for the competitor's line as you would for your own company's line
4. Look at the competition as though you wanted to buy their products/services

C. Techniques Used in Dealing With the Competition

1. Realize that the customer may be loyal to your competition
2. Treat the competition with respect
3. Make comparisons with competition based on fact
4. Stress your company's product features and benefits with regard to strengths over the competition
5. Advantages of the competitor's products/services

MARKET DEVELOPMENT

TELEMARKETING SPECIALIST

MARKETING TASKS

PURPOSE: This unit is designed to give the participants an understanding of the process of market development as it applies to companies using telemarketing.

OBJECTIVES: Upon the completion of this unit, participants will:

* be able to describe the process involved in market development

ACTIVITIES: Review the content outline provided and discuss topics included here, in addition to other topics that would be appropriate to the subject area.

Ask students to develop a marketing plan for a product or company. The use of nonexistent companies or products work best.

EVALUATION: The participants should be able to describe the process involved in market development.

The participants should be able to develop a marketing plan for a product or company.

RESOURCES: "Basic Marketing", E. Jerome McCarthy and William D. Perreault, Jr.
Ninth Edition, 1987
Irwin Publishers

"Marketing", Berkowitz, Kerin, and Redelius
Times Mirror/Mosby College Publishing
St. Louis, 1986

"Marketing: Basic Concepts and Decisions"
by William M. Pride and O. C. Ferrell
Houghton Mifflin Company, 1987

CONTENT OUTLINE

A. Market Plan Development Process

1. Marketing plans are used to develop a market for:
   a. Individual products
   b. Product lines
   c. Entire companies

2. Development of marketing objectives

3. Assessment of marketing opportunities

4. Formulation of marketing strategies

5. Development of the plan for implementation and control

6. Implementation of the marketing plan

B. Development of Markets

1. Consumer vs. industrial markets

2. Market opportunity analysis
   a. National markets
   b. Regional markets
   c. State-wide markets
   d. Local markets

3. Market segmentation
   a. Total market approach
   b. Differentiated markets

4. Selection of target markets

5. Marketing mix development
   a. Product
   b. Price
   c. Promotion
   d. Place (distribution)

6. Consideration of external forces
   a. Legal forces
   b. Regulatory forces
   c. Economic and competitive forces
   d. Technological forces
   e. Political forces

7. Determine buying motives

8. Promotional mix
   a. Advertising and publicity
   b. Personal selling and sales promotion
   c. Pricing strategies

DAILY CALCULATIONS

TELEMARKETING SPECIALIST

MARKETING TASKS

PURPOSE: This unit is designed to help the participants complete daily calculations and keeping track of daily sales.

OBJECTIVE: Upon completion of this unit, participants will:

* be able to demonstrate an ability to complete daily calculations required of telemarketers

* be able to demonstrate an ability to keep track of daily sales

ACTIVITIES: Reference should be made to a later unit of instruction dealing with "Minimum Skill Tasks" and the topic of fundamental math processes and records. This unit may be completed at this time or delayed until a more appropriate time.

Discuss the need for keeping daily sales records in accordance with company policy. Invite a guest speaker to talk about recordkeeping processes that are required in the telemarketing industry. The topics covered by the speaker should be with regard to the entry-level and telemarketing specialist positions within a company. Examples of sales records should be shared with students, and students should have practice in completing these sales reports.

EVALUATION: The participants should be able to demonstrate an ability to complete daily calculations required of telemarketers. This unit is referenced above and may be completed at another time.

The participants should be able to demonstrate an ability to keep track of daily sales.

RESOURCES: None have been identified.

INVENTORY CONTROL

TELEMARKETING SPECIALIST

MARKETING TASKS

PURPOSE: This unit is designed to provide the participants with information concerning inventory control methods used by businesses.

OBJECTIVE: Upon completion of this unit, participants will:

* be able to describe inventory control methods used in businesses and the relationship of telemarketing to maintain accurate inventory control records.

ACTIVITIES: Discuss inventory control methods used by local businesses that are considered telemarketing firms. Make reference to the content outline that is provided for other possible topics.

EVALUATION: The participants should be able to describe inventory control methods used in businesses and the relationship of telemarketing to maintain accurate inventory control records.

RESOURCES: "Basic Marketing", E. Jerome McCarthy and William D. Perreault, Jr.
Ninth Edition, 1987
Irwin Publishers

CONTENT OUTLINE

A. Inventory Control

1. Just-in-time delivery techniques

2. Anticipating adequate inventory levels
   a. Seasonal demand
   b. Special sales promotions that affect demand

3. The use of on-line computer systems to maintain inventory control

4. Inventory levels and shipping deadlines

5. Importance of checking inventory levels when selling

6. FIFO and LIFO methods

7. Maintaining inventory records when sales are made

TELEMARKETING

TELEMARKETING SPECIALISTS

MARKETING TASKS

Several additional topics are related to the major category of marketing tasks, and would be appropriate to cover if time permits. These topics include:

1. Wholesaling and retailing
2. Defining your market
3. Economic conditions of markets
4. Purchasing and pricing
5. Pricing

6. Channels of distribution
7. Promotional theory
8. Broadcast media
9. Advertising print media
10. Introduction to industrial marketing

11. Overview of direct marketing
12. Mailing lists
13. Direct mail formats
14. Creative tactics
15. Market research

16. Market research project
17. Sales analysis
18. Sales volume and breakeven charts
19. Ordering and receiving
20. Marketing trends

21. Legal, ethical, and moral requirements

For the purposes of this curriculum guide, only those topics which were indicated to be highly important or of medium importance were included in the curriculum design. Additional topics may be developed in the formulation of the curriculum as deemed appropriate.

TELEMARKETING

TELEMARKETING SPECIALIST

BUSINESS RELATED TASKS

Within this section there was one topic that was indicated as being highly important to the success of the individual who would be working as a telemarketing specialist. This topic was "computer keyboarding".

COMPUTER KEYBOARDING

TELEMARKETING SPECIALIST

BUSINESS RELATED TASKS

PURPOSE: This unit is designed to assist participants in developing computer keyboarding skills.

OBJECTIVE: Upon completion of this unit, participants will:

* be able to demonstrate an ability to use the computer keyboard with an acceptable level of skill

ACTIVITIES: Students should complete some form of computer keyboarding instruction. There are several different resources available for this purpose, many which are available in individualized forms of instruction. Establish an acceptable skill level for students to achieve, given their background, time available for completion, and the requirements of the job market.

EVALUATION: The participants should be able to perform basic computer keyboarding skills at an acceptable level upon completion of this unit of instruction.

RESOURCE: "MICRO-Typewriter Software"
Electric typewriter emulator (calculates WPM)
Available from:
S. E. Warner Software, Inc.
P. O. Box 727
Cedar Falls, Iowa 50613
(319)-277-5185

"MICROPACE"
Timed writing program and skill development (Must be used with South-Western Typing books)
Available from:
South-Western Publishing Co.
5101 Madison Road
Cincinnati, OH 45227

"MICRO-Keyboarding (available Fall 1987)
Keyboarding lessons (not tutorial-instructor directed)
Available from:
S. E. Warner Software, Inc.
P. O. Box 727
Cedar Falls, Iowa 50613
(319)-277-5185

"MICROCOMPUTER Keyboarding" (Tutorial)
Available from:
South-Western Publishing Co.
5101 Madison Road
Cincinnati, OH 45227

TELEMARKETING

TELEMARKETING SPECIALIST

BUSINESS RELATED TASKS

Within this section there were two topics which were determined to be of medium importance to the success of a person employed as a telemarketing specialist. These topics were:

1. Law of sales (verbal contracts, application to telemarketing, and implied warranties)

2. Time management

CONSUMER LAWS

TELEMARKETING SPECIALIST

BUSINESS RELATED TASKS

PURPOSE: This unit is designed to assist participants in acquiring knowledge of laws related to sales (verbal contracts, application to telemarketing, and implied warranties).

OBJECTIVE: Upon completion of this unit, participants will:

* be able to explain consumer laws that are associated with the sale of products/services in telemarketing situations; i.e. verbal contracts and implied warranties

EVALUATION: The participants should be able to describe the various laws that are associated with the sale of products/services in a telemarketing situation, with particular attention being paid to verbal contracts and implied warranties.

RESOURCES: "Law and the Consumer"
by Arbetman, McMahon, and O'Brien
West Publishing Company
St. Paul, MN

"Consumer Law"
by Furlong and McMahon
West Publishing Company
St. Paul, MN

CONTENT OUTLINE

A. How Laws Protect the Consumer

1. Federal Laws; i.e.:
   a. Federal Food, Drug, and Cosmetic Act
   b. Consumer Product Safety Act
   c. Federal Trade Commission (FTC)
2. State Laws
3. Local Laws

B. Deceptive Sales Practices to Avoid

1. Bait and switch tactics
2. Phony contests
3. Mail-order fraud
4. False advertising
5. Materials and repair fraud

C. Verbal Contracts

1. Difference between a promise and a contract
   a. Promises made by one person
   b. Promise doesn't require something in return
2. A contract is an exchange of promises between two or more people
   a. There is an exchange of money, service or property on the part of both parties
   b. A contract can be enforced in court
3. Elements of a contract
   a. Offer by one party
   b. Acceptance by the other party
   c. Called mutual agreement
   d. In every valid contract there must also be an exchange of consideration (something of value)
4. Minors and contracts
   a. A minor is a person under legal age
   b. Although minors can make contracts, they usually cannot be upheld in court
5. Contracts can be written or verbal
   a. Some contracts must be in writing to be enforced
      (1) Sale of land
      (2) Sale of goods priced at $500 or more
      (3) Promise to pay debt beyond one year
   b. Advice on contracts
      (1) Never sign a contract with blank spaces
      (2) Never sign a contract to get rid of an irritating salesperson
      (3) Never sign a contract without getting a copy

(4) Never sign a contract unless all promises are included in writing and the total amount of money to be paid by the buyer is clearly stated
(5) Never sign a contract unless you read and understand everything

D. Expressed Warranties

1. Is a statement--written, oral, or by demonstration--concerning the quality or performance of goods offered for sale
2. Created by statements of fact, but not everything a seller says is a warranty; i.e., opinion
3. If a product's warranty is violated or breached, the consumer can go to court to:
   a. Cancel the contract
   b. Sue for damages
   c. Demand a product that conforms to the warranty

E. Implied Warranties

1. The unwritten standard of quality required, by law, of a product offered for sale
   a. Warranty of merchantability
   b. Warranty of fitness for a particular purpose
   c. Warranty of title

TIME MANAGEMENT

TELEMARKETING SPECIALIST

BUSINESS RELATED TASKS

PURPOSE: This unit is designed to assist the participants understand the principles of time management.

OBJECTIVE: Upon completion of this unit, participants will:

* be able to demonstrate an understanding of the basic principles of time management

ACTIVITIES: Discuss the principles of time management as described in the content outline provided.

View the film "Getting Control of Your Time and Your Life".

Have participants develop a "to do" list of things they have to do the next day and then assign "A", "B", or "C" to each activity.

EVALUATION: The participants should be able to demonstrate an understanding of the basic principles of time management.

The participants should be able to put into practice the principles of time management.

RESOURCES: "How to Get Control of Your Time and Your Life"
by Alan Lakein
Paperback book from:
Signet Books
New American Library

"The Time of Your Life", 16mm film

"The Management of Time"
by James T. McCay
Prentice Hall, 1978

CONTENT OUTLINE

A. Time Management

1. The pressure of time

2. The challenge of change

3. Breaking through the time barrier

4. Overcoming time pressures
   a. How to increase your output
   b. Freedom to manage your time
   c. Increase your alertness

5. Skills for managing time
   a. Knowing when to stop and say "no"
   b. Insure your investment in time
   c. Diagramming
   d. Compare and save time
   e. Read for growth

6. Plan for development
   a. Measuring up to the big problems
   b. Plan to manage your time
   c. Start NOW

7. Time Wasters
   a. Phone calls
   b. Paperwork
   c. Unexpected visitors
   d. Procrastination
   e. Not planning-"Failing to Plan is Planning to Fail"
   f. Lack of goals and priorities
   g. Overcommitment
   h. Management by crisis
   i. Haste makes waste
   j. Too many meetings, doing everything by committee
   k. Lack of delegation
   l. Indecision

8. Using a "To Do" List
   a. List activities and projects
   b. Prioritize the list using A, B, and C
   c. The "A's" must be done and again prioritized
   d. The "C's" may never have to be done--put them in a "C" drawer for later reference
   e. Resort the "B's" into either "A's" or "C's"

9. Using the Swiss Cheese technique

TELEMARKETING

TELEMARKETING SPECIALIST

BUSINESS RELATED TASKS

Additional topics which are related to the major category of marketing tasks, could bee covered if time permits. These are listed below:

1. Payroll and taxes
2. Trends in small business
3. Using financial statements
4. Starting a new business
5. Finance and banking
6. Business systems
7. Management functions
8. Planning/controlling
9. Income and loss
10. Planning costs and budgeting
11. Controlling costs and budgeting
12. Credit cards, ratings, and billings
13. Credit policies
14. Collection and follow-up
15. Consumer credit strategies
16. Sources of consumer credit
17. Role of consumer credit
18. Types of credit
19. Cost of credit
20. Credit limit
21. Credit bureau and collection agencies
22. Collection procedures
23. Credit promotion
24. Computer-based financial management
25. Spreadsheets
26. Data base
27. Word processing
28. Graphics

For the purposes of this curriculum guide, only those topics which were indicated to be highly important or of medium importance were included in the curriculum design. Additional topics may be developed in the formulation of the curriculum as deemed appropriate.

TELEMARKETING

TELEMARKETING SPECIALIST

BUSINESS SPECIFIC TASKS

Within this section there were two topics that were indicated as being highly important to the success of the person working as a telemarketing specialist. These topics are listed below. Several other topics were indicated to be of medium importance to the telemarketing specialist. These topics are listed as well and will be developed into one section because they are so closely related.

Highly Important Topics:

1. Collection and follow-up

2. External research procedures

Topics of Medium Importance:

1. Credit cards, ratings, and billings
2. Credit policies
3. Consumer credit strategies
4. Sources of consumer credit
5. Role of consumer credit

6. Types of credit
7. Credit limit
8. Credit bureau and collection agencies
9. Collection procedures
10. Credit promotion

11. Market research
12. Marketing research tools
13. Introduction to external market research
14. Introduction to internal research
15. Processing and analysis of survey results

16. Market research projects
17. Legal, ethical, and moral requirements

An additional topic which could be developed if time permits is "cost of credit".

CONSUMER CREDIT

TELEMARKETING SPECIALIST

BUSINESS SPECIFIC TASKS

PURPOSE: This unit is designed to provide the participants with information regarding a variety of topics. These topics are being developed as a total unit because of the similarity of subject matter. These topics are as follows:

1. Credit cards, ratings, and billings
2. Credit policies
3. Consumer credit strategies
4. Sources of consumer credit
5. Role of consumer credit
6. Types of credit
7. Credit bureau and collection agencies
8. Credit promotion

OBJECTIVE: Upon completion of this unit, participants will:

* be able to outline information to demonstrate their understanding of each of the topics listed above

ACTIVITIES: Review each of the topics contained in the content outline.
It may be appropriate to include these topics in a discussion led by a guest speaker in an earlier unit of instruction. The key is to cover each topic as it would relate to a telemarketing specialist position.

EVALUATION: The participants should be able to demonstrate an understanding of each of the topics listed above.

RESOURCES: "Your Credit Rights"
Available from:
Federal Reserve Bank of Minneapolis
Minneapolis, MN 55480

"Consumer Economics"
by Lewis Mandell
Available from:
Science Research Associates, Inc.
Chicago, IL, 1981

"Law and the Consumer"
by Arbetman, McMahon, and O'Brien
Available from:
West Publishing Company
St. Paul, MN, 1982

CONTENT OUTLINE

A. Credit Cards, Ratings, Billings

1. Closed-ended credit
2. Open-ended credit
3. Revolving credit
4. Types of credit cards--security measures
5. Charge accounts--companies that are using them
6. Applications for credit
7. Dealing with lost/stolen credit cards
8. Payment plans
9. Use of credit ratings--refer to local practices
10. Billing procedures
11. Dealing with inaccurate bills

B. Credit Policies

1. Review of credit policies of local businesses
2. Open accounts
3. Use of purchase orders
4. Need for following company credit policies
5. Costs associated with sales on bad credit

C. Consumer Credit Strategies

1. Reasons companies make consumer credit available
2. Techniques used in extending credit
3. Background investigation techniques to check references
4. Sources of consumer credit information

D. Sources of consumer credit

1. Retail stores (department, discount, gasoline, etc.)
2. National retail business credit
3. Local merchant credit
4. Savings and Loan Associations
5. Credit unions
6. Banks
7. Lending agencies
8. Life insurance policies
9. Loan sharks
10. Others

E. Role of Consumer Credit

1. Importance to business operation
2. Effects on cash flow
3. Risks involved for consumers and businesses
4. Effects on local economy
5. Increased purchasing power

F. Types of Credit

1. Revolving accounts
2. Open-ended accounts
3. Secured credit
4. Unsecured credit
5. Interest charges--when do they occur

G. Credit Bureau and Collection Agencies

1. Credit bureaus as a source of information
2. Services provided
3. Limitations to services available
4. Legal collection techniques
5. Repossessions
6. Collection agency fees

H. Credit Promotion

1. Techniques used in promotion of the use of credit
2. Reasons for promoting use of credit
3. Cost of promotion

CREDIT LIMITS

TELEMARKETING SPECIALIST

BUSINESS SPECIFIC TASKS

PURPOSE: This unit is designed to assist participants in developing an understanding of credit limits used in businesses with regard to consumer credit situations.

OBJECTIVE: Upon the completion of this unit, participants will:

* be able to describe factors related to credit limits for consumers

ACTIVITIES: Discuss the topics contained in the content outline provided with regard to consumer credit limits.

Stress the importance of establishing limits on credit available to consumers.

Invite a guest speaker who has expertise in working with consumer credit to address these issues. Have students establish their own credit limits based on the information presented by the speaker.

EVALUATION: The participants will be able to describe factors related to credit limits for consumers. The participants should be able to establish their own credit limits.

RESOURCES: "Your Credit Rights"
Available from:
Federal Reserve Bank of Minneapolis
Minneapolis, MN 55480

"Consumer Economics"
by Lewis Mandell
Available from:
Science Research Associates, Inc.
Chicago, IL, 1981

"Law and the Consumer"
by Arbetman, McMahon, and O'Brien
Available form:
West Publishing Company
St. Paul, MN, 1982

CONTENT OUTLINE

A. Consumer Credit

1. Types of credit
2. Who should use credit
3. The cost of credit
4. Steps to obtaining credit
5. Reasons for limiting consumer credit

B. Factors Involved in Limiting Consumer Credit

1. Limitations set by management policy
2. Customer's ability to pay
3. History of customer credit experience
4. Size of the purchase/amount to be financed

COLLECTION PROCEDURES

TELEMARKETING SPECIALIST

BUSINESS SPECIFIC TASKS

PURPOSE: This unit is designed to assist the participants in understanding collection procedures and follow-up techniques that are used by telemarketers.

OBJECTIVE: Upon completion of this unit, participants will:

* be able to demonstrate an understanding of collection procedures used in telemarketing

* be able to demonstrate an understanding of follow-up techniques used with collections

ACTIVITIES: Discuss the topics related to collection procedures.

This unit may be tied into the previous unit and discussed by a guest speaker.

EVALUATION: The participants should be able to demonstrate an understanding of collection procedures used in telemarketing.

The participants should be able to describe follow-up techniques used in collections in a telemarketing situation.

RESOURCES: "Your Credit Rights"
Available from:
Federal Reserve Bank of Minneapolis
Minneapolis, MN 55480

"Consumer Economics"
by Lewis Mandell
Available from:
Science Research Associates, Inc.
Chicago, IL, 1981

"Law and the Consumer"
by Arbetman, McMahon, and O'Brien
Available from:
West Publishing Company
St. Paul, MN, 1982

MARKET RESEARCH

TELEMARKETING SPECIALIST

BUSINESS SPECIFIC TASKS

PURPOSE: This unit is designed to provide the participants with information regarding a variety of topics. These topics are being developed as a total unit because of the similarity of subject matter. These topics are as follows:

1. Market research
2. Marketing research tools
3. Introduction to external market research
4. External research procedures
5. Introduction to internal research
6. Processing and analysis of survey results
7. Market research project
8. Legal, ethical, and moral requirements

OBJECTIVES: Upon completion of this unit, participants will:

* be able to demonstrate an understanding of each of the topics listed above

* be able to demostrate their understanding of marketing research by completing a research project

ACTIVITIES: Discuss each of the topics contained in the content outline provided. It may be helpful to have an expert in the field of marketing research visit the class to further discuss the principles of marketing research. Emphasis should be placed on the relationship of telemarketing to the function of marketing research.

EVALUATION: Participants should be able to demonstrate an understanding of each of the topics listed above.

Participants should be able to demonstrate an understanding of marketing research by completing a marketing research project.

RESOURCES:

"Marketing Management: Analysis, Planning, and Control"
by Philip Kotler
Fifth Edition, 1984
Prentice-Hall

"Marketing: Basic Concepts and Decisions"
by Pride and Ferrell
Fifth Edition, 1987
Houghton Mifflin Company
Geneva, Illinois

"Marketing Mangaement"
by Kenneth R. Davis
Fifth Edition, 1985
John Wiley & Sons
New York

"Marketing Research: An Applied Approach"
by Thomas C. Kinnear and James R. Taylor
Second Edition, 1983
McGraw-Hill Book Company

CONTENT OUTLINE

A. Market Research

1. The marketing research system
   a. Examples of marketing research
   b. The marketing mix
   c. Basic and applied research
2. The research process
   a. Need for information
   b. Research objectives and information needs
   c. Data sources
   d. Data collection forms
   e. Sample design
   f. Data collection
   g. Data processing
   h. Data analysis
   i. Presentation of results
3. Errors in marketing research
   a. Sampling errors
   b. Nonsampling errors
   c. The effect of nonsampling errors
   d. Types of nonsampling errors
      (1) Faulty problem definition
      (2) Defective population definition
      (3) Nonresponse errors
      (4) Measurement errors
      (5) Poor questionnaire design
      (6) Auspices bias
      (7) Interviewer-related errors
      (8) Data processing errors
      (9) Data analysis errors
      (10) Interpretation errors

B. Marketing Research Tools

1. The basics of sampling
2. Determination of sample size
   a. Stratified sampling
   b. Cluster sampling
   c. Systematic sampling
   d. Area sampling
   e. Random-digit dialing
3. Attitude measurement
4. Surveys and questionnaires
   a. Mail
   b. Telephone
   c. Personal
5. Experiments
6. Observations

C. Introduction to External Market Research

1. Sources of secondary data
2. Requirements of developing primary data

D. External Research Procedures

1. Secondary data searches
   a. Purchased from research firms
   b. Purchased from noncompeting firms
   c. Available from governmental agencies

2. The research process of primary data
   a. Need for information
   b. Research objectives and information needs
   c. Data sources
   d. Data collection forms
   e. Sample design
   f. Data collection
   g. Data processing
   h. Data analysis
   i. Presentation of results

E. Introduction to Internal Research

1. Purposes of internal research
   a. Survey attitudes of employees
   b. Generate ideas for new products, resolution of problems, etc.
2. Uses of internal research
   a. Used to further the development of the company
   b. Sold to external agencies and organizations
   c. Used to gain support from customers or contributors

F. Processing and Analysis of Survey Results

1. Research design must be in place before data is gathered
2. Use of internal computers for analysis vs. contracting with external resources
3. Equipment requirements for processing and analysis
4. Technical aspects of processing vs. quality of output

G. Market Research Project

1. Students can either work in small groups or on an individual basis to:
   a. Design a marketing reseach project which is to gather either primary or secondary data
   b. Complete the guidelines set forth by the instructor
2. Follow the marketing research process outlined below:
   a. Need for information
   b. Research objectives and information needs
   c. Data sources
   d. Data collection forms
   e. Sample design
   f. Data collection
   g. Data processing
   h. Data analysis
   i. Presentation of results

H. Legal, Ethical, and Moral Requirements

1. Review legal requirements for gathering information from respondents
   a. Right to privacy
   b. Confidentiality of information
   c. Disclosure of information falsely gathered
   d. Reporting of findings by respondent should be done only with consent

2. Code of ethics for researchers. Respondents have:
   a. The right to choose whether or not to participate in a study
   b. The right to safety
   c. The right to be informed of results
   d. The right to no intentional or deliberate misrepresentation of research methods or results.
   e. The right to the identity of the survey sponsor

3. Discuss the moral requirements of gathering and reporting research findings with regard to the persons who are asked to provide input into the process.

TELEMARKETING

TELEMARKETING SPECIALIST

PERSONNEL/HUMAN RESOURCES RELATED

Within this section there were several topics which were indicated as being highly important to the success of the person working as a telemarketing specialist. Topics include:

1. Dealing with anger
2. Goal setting
3. Career research
4. Understanding human behavior
5. Psychology - consumer behavior - self

CONSUMER BEHAVIOR & DEALING WITH ANGER

TELEMARKETING SPECIALIST

PERSONNEL/HUMAN RFSOURCES RELATED

PURPOSE: This unit is designed to provide the participants with an understanding of the psychology of consumer behavior, and self, and how to deal with anger on the job.

OBJECTIVES: Upon completion of this unit, participants will:

* be able to demonstrate an understanding of the psychology of consumer behavior and self

* be able to demonstrate an understanding of how to deal with anger on the job

ACTIVITIES: Discuss the topics contained in the content outline provided.

Case studies can be developed or referenced for use in class to give the participants experience with the following topics:

1. Psychology of consumer behavior
2. Psychology of self
3. Dealing with anger

EVALUATION: The participants should be able to demonstrate an understanding of the psychology of consumer behavior and self.

The participants should be able to demonstrate an understanding of how to deal with anger on the job.

RESOURCES: "Marketing"
by William M. Pride and O. C. Ferrell
Houghton Mifflin Company

CONTENT OUTLINE

A. Psychology of Consumer Behavior

1. Consumer buying decision process
   a. Problem recognition
   b. Information search
   c. Evaluation of alternatives
   d. Purchase
   e. Postpurchase evaluation

2. Influences on consumer buying decision process
   a. Person-specific influences
      (1) Demographic factors
      (2) Situational factors
   b. Psychological influences
      (1) Perception
      (2) Information inputs
      (3) Selective exposure
      (4) Selective distortion
      (5) Self-concept
      (6) Learning
      (7) Attitudes
      (8) Personality
   c. Social influences
      (1) Roles and family influences
      (2) Reference group influences
      (3) Social classes
      (4) Cultural and subcultural influences

B. Psychology of Self

1. Individual's role in the work place
2. Relationships with employer/supervisor/boss
3. Relationships with co-workers
4. Work ethic
5. Job performance vs. job satisfaction
6. Self-image and self-concept
7. Relationships with clients and customers

C. Dealing with Anger

1. Recognize the cause of the anger
2. Identify who is involved in the situation
3. Give others the benefit of doubt
4. Take ten to cool off
5. Realize the customer may be wrong, but remember the CUSTOMER IS ALWAYS RIGHT policy
6. Work toward problem resolution
7. Confront the problem vs. ignore the problem
8. Think before speaking
9. Look at the situation through the other person's eyes
10. Don't gunnysack problems; deal with each one as it arises

GOAL SETTING

TELEMARKETING SPECIALIST

PERSONNEL/HUMAN RESOURCES RELATED

PURPOSE: This unit is designed to assist the participants with skill in goal setting.

OBJECTIVES: Upon completion of this unit, participants will:

* be able to identify techniques used in goal setting
* be able to demonstrate an ability to set goals that are professional and/or personal

ACTIVITIES: Review the information contained in the content outline.

Work through an example using the format in the content outline to demonstrate the process of goal setting to the participants.

Participants should develop short-range and long-range goals that are of a professional and/or personal nature. These may be shared with the class if desired by the participants. Goal setting can be personal and students should not be forced to share what they have developed. They may, however, want to discuss their goals with the instructor in terms of how to go about achieving their goals.

EVALUATION: The participants should be able to identify techniques used in goal setting.

The participants should be able to demonstrate an ability to set goals that are professional and/or personal.

RESOURCES: None identified specifically.

CONTENT OUTLINE

A. Goal Setting Techniques

1. Goals are general statements of what is to be achieved.
   a. You cannot do a goal.
   b. You need to identify steps that can be used to reach your goals.
2. Start with one small goal at first.
   a. Setting too large a goal or one that takes a long time can be discouraging.
   b. After initial success, it is easier to move onto more complex goals.
3. Statement of the goal(s)
   a. List steps to be followed in achieving the goal.
   b. List others who could help you achieve your goal.
   c. List resources needed to achieve the goal.
   d. Establish timelines for each step toward your goal.
   e. Set a time or date to reach your goal.
4. State of outcomes from your goals.
   a. What will happen after the goal is achieved?
   b. What benefits will be derived from the goal?
   c. How will you know that you have achieved your goal?
5. What to do if the goal is not reached on time.
   a. Don't give up, restructure your plan.
   b. Keep trying; realize that this isn't a failure, only a delay in achieving your goal.
6. Overcome procrastination.

B. Visualize Yourself Having Reached Your Goal

1. What will be different about your life after you reach your goal?
2. What will you look like, what kind of job will you have, where will you be living, etc.
3. Realize goals don't just happen; they take work.
4. Change takes time.
5. You must benefit in some way from your goals if you are going to be able to stay with them to the finish.

CAREER SEARCHES & CHANGING JOBS

TELEMARKETING SPECIALIST

PERSONNEL/HUMAN RESOURCES RELATED

PURPOSE: This unit is designed to provide the participant with an understanding of techniques used in doing career research and in changing jobs.

OBJECTIVES: Upon completion of this unit, participants will:

* be able to identify techniques used in doing career research

* be able to demonstrate an understanding of techniques used in changing jobs

ACTIVITIES: Review the topics contained in the content outline provided. Stress the importance of doing a thorough job of researching careers following a logical sequence of steps to make job changes.

EVALUATION: The participants will be able to identify techniques used in doing career research.

The participants will be able to demonstrate an understanding of techniques used in changing jobs.

RESOURCES: "How to Get a Job Guide"
Business Week's Guide to Careers
1986 Edition

"Business Week--Careers"
September/October/November 1986
March/April 1987
Available from:
McGraw-Hill Publication

CONTENT OUTLINE

A. Career Research Techniques

1. First step in the process is to identify the career field.
   a. The one you are in now
   b. Whether you want to stay in the same field
   c. The one you would like to change to if appropriate

2. Gather information about the career field.
   a. Talk to prospective employers using the backdoor approach to interviewing.
   b. Identify companies you would like to research.
   c. Contact manager, vice president or someone at a higher level in the organization.
   d. Get their name, title, phone number and address.
   e. Make an appointment with them to discuss careers in their field; i.e., telemarketing careers.
   f. Meet with them (recommend setting a 30 minute limit on the time you want, if more time is needed let them suggest setting a longer time).
   g. Prepare a list of questions you want to ask of this person.
      (1) Qualifications of the people recently hired by the company
      (2) Company's expectations of the persons they hire into specific positions of interest to you
      (3) The qualities they expect in employees
      (4) Available training
      (5) Advancement opportunities available
      (6) Additional training and education requirements
      (7) Others that are appropriate
   h. Do not mention that you are looking for a job--you are merely exploring careers.
   i. Avoid wasting time--stick to your questions and then leave at the end of the appointment unless invited to stay longer.
   j. After each appointment, send a letter of thanks to the person you interviewed. Give them your impressions of their company and indicate your interest in seeking possible employment with their firm.
   k. Complete as many of these interviews as needed to gain adequate information about careers of interest.

3. Research careers by talking to experts in the field of job placement.
   a. Be aware that some agencies charge for this service.
   b. Other firms may charge a small fee to input your occupational data into their files.
   c. Let the experts know if you want your file provided to prospective employers with or without notice.
   d. Keep your options open; don't limit yourself to a geographic area unless you are not able to move.

B. Techniques for Changing Jobs

1. After completing your career research, identify several specific companies that you would like to contact.

2. Identify the person(s) within each organization that would be appropriate to contact.

3. Send letter of introduction along with your resume to each of these individuals, or contact them personally to set up a time to see them, possibly using the steps outlined above to explore career possibilities.

4. Keep records of which companies you have contacted--it's embarrassing to be called by a company and then not remember who they are or what they do.

5. Follow job interviewing procedures outlined in another unit of instruction.

6. Be cautious who you tell about your plans to change jobs.
   a. This information can be upsetting to current employers.
   b. Ask potential employers to contact you before making contact with your current employer so you are aware of any reference checks they might make on you.

7. Identify the pros and cons of making each job change and prioritize them so that you can make a sound decision whether or not to actually make the change.

TELEMARKETING

TELEMARKETING SPECIALIST

PERSONNEL/HUMAN RESOURCES RELATED

Within this section there were several topics that were indicated as being of medium importance to the success of a person employed as a telemarketing specialist. These topics are listed below:

1. Letter of application
2. Application forms
3. Resume
4. Interview
5. Appeal to emotion
6. Reading/understanding trade journals
7. Job change (Covered in previous instructional unit)

The following topics should be included in a course which covers management and supervision of employees. Additional topics can be added to such a course as appropriate. Emphasis for such a course should be placed upon the management and super- vision of telemarketing employees. The course title may include Personnel Supervision, Principles of Management, Principles of Supervision, etc.

8. Transactional analysis (neuro-linguistic programming)
9. Attitudes
10. What is supervision?
11. Directing human resources
12. Labor relations
13. Motivating and leadership skills
14. Monitoring and motivating

LETTERS OF APPLICATION

TELEMARKETING SPECIALIST

PERSONNEL/HUMAN RESOURCES RELATED

PURPOSE: This unit is designed to provide the participants with an understanding of what constitutes a professionally prepared letter of application.

OBJECTIVE: Upon completion of this unit, participants will:

* be able to demonstrate an understanding of the elements of a professionally prepared letter of application

* be able to prepare a professional letter of application

ACTIVITIES: Discuss the elements of a professionally prepared letter of application. Review the different types of letters of application and when they should be used. Refer to the information contained in the outline and the sample letters provided.

Have the students write and then type several letters of application which could be used as a format for an actual job application.

EVALUATION: The participants will be able to demonstrate an understanding of the various elements contained in a professionally prepared letter of application.

The participants will be able to demonstrate an ability to prepare and type a professional letter of application.

RESOURCES: "How to Get a Job Guide"
Business Week's Guide to Careers
1986 Edition

"Business Week--Careers"
September, October, and November 1986
March/April 1987
Available from:
McGraw-Hill Publication

CONTENT OUTLINE

A. Types of Application Letters

1. Form letters sent to multiple employers
   a. Can be duplicated in large qualities
   b. With use of word processing, addresses can be customized for more effectiveness
   c. Sent to prospective employers to introduce candidate and seek any job that is available for which they are qualified

2. Specific letters applying for a known vacancy
   a. Should be addressed to the person or department having the vacancy
   b. Mention where the opening announcement was found
   c. Mention specifically the job you are seeking

B. Tips for Writing a Good Cover Letter

1. Send a typed original letter with your resume.

2. Try to avoid form letters.

3. Never send a photocopied letter or handwritten letter.

4. Address the letter to a specific individual if possible.

5. Sound upbeat and confident--use positive language.

6. Tailor your letter to the needs of the company and the requirements of the job you are seeking.

7. State the position you are seeking.

8. Recommend stating some follow-up to the letter you are sending; i.e., that you will call, visit, etc.

9. Match your stationery and resume stock in both size and shade. Use 8 1/2" X 11" paper in white, off-white, ivory, or light gray.

C. Refer to the sample letters provided on the following pages

1. Letter of introduction

2. Letter of application

LETTER OF INTRODUCTION

SAMPLE

527 Shoreline Drive
Des Moines, Iowa 50130
(515)-299-6565

Ms. Jennifer Morganson
Vice President for Marketing
Telecommunications, Inc.
429 South Grand Avenue
Des Moines, Iowa 50310

Dear Ms. Morganson:

The Telemarketing Sales Division of Telecommunications, Inc. has an excellent reputation in Des Moines and the state of Iowa. Your firm has received some very positive publicity in the past week in regard to its plans to expand operations into a new location in West Des Moines. This is very good news for experienced people in the field of telemarketing. I am such a person, having just completed my sixth year in the field of telemarketing with a Des Moines based company.

Your name was referred to me by Mr. Adam Thompson of Telestar, Inc. because of your professional expertise in telemarketing and your interest in acquiring qualified and well-trained personnel. As you can see from my enclosed resume, I have two years of training in addition to the six years of telemarketing work experience. I feel strongly that I have the qualifications to fill a position in one of your departments as you make plans for this important expansion.

Please review my resume and feel free to contact any of the references listed. I am certain you need. I look forward to the opportunity of discussing in greater detail how your organization's goals for the future can be served by my capabilities. Please contact me if you desire more information.

Sincerely,

(Signature)
John Smith

LETTER OF APPLICATION

SAMPLE

527 Shoreline Drive
Des Moines, Iowa 50130
(515)-299-6565

Ms. Jennifer Morganson
Vice President for Marketing
Telecommunications, Inc.
429 South Grand Avenue
Des Moines, Iowa 50310

Dear Ms. Morganson:

The purpose of this letter is to apply for the position of Sales Supervisor in the Directory Service Center of your organization. This position was advertised in the Des Moines Register this past Sunday. The Telemarketing Sales Division of Telecommunications, Inc. has an excellent reputation in Des Moines and the state of Iowa. Your firm has received some very positive publicity in the past week, in regard to its plans to expand operations into a new location in West Des Moines. This is very good news for experienced people in the field of telemarketing. I am such a person, having just completed my sixth year in the field of telemarketing for a Des Moines based company.

Mr. Adam Thompson of Telestar, Inc. has mentioned your name because of your professional expertise in telemarketing and your interest in acquiring qualified and well-trained personnel. As you can see from my enclosed resume, I have two years of training in addition to the six years of telemarketing work experience. I feel strongly that I have the qualifications to fill the position of Sales Supervisor in the Directory Service Center of your company.

Please review my resume and feel free to contact any of the references listed. I am certain that you will find I have the background that you need. I look forward to the opportunity of discussing in greater detail how your organization's goals for the future can be served by my capabilities. Please contact me if you desire more information.

Sincerely,

(Signature)
John Smith

JOB APPLICATIONS & RESUMES

TELEMARKETING SPECIALIST

PERSONNEL/HUMAN RESOURCES RELATED

PURPOSE: This unit is designed to provide the participants with an understanding of and skill in completing job applications and developing of resumes.

OBJECTIVES: Upon completion of this unit, participants will:

* be able to demonstrate an understanding of the importance of job applications to the interviewing process

* be able to demonstrate an ability to complete job applications

* be able to demonstrate an ability to develop a professional resume

ACTIVITIES: Review the information contained in the content outline provided.

Have a guest speaker who is addressing topics in previous units of instruction discuss each of these topics.

Furnish copies of job application forms to students and ask them to complete the forms for practice. Stress the need for neatness, accuracy, and completeness.

Share with the students several resume formats. Have them choose one of the formats and then develop their own resume. This should be placed on file with the instructor for future reference.

EVALUATION: The participants should be able to demonstrate an understanding of the importance of job applications to the interviewing process.

The participants should be able to demonstrate an ability to complete job applications.

The participants should be able to demonstrate an ability to develop a professional resume.

RESOURCES: "How to Get a Job Guide"
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CONTENT OUTLINE

A. Application form

1. Purposes of the application form
   a. Gather information on the applicants
   b. Used by managers to prepare for interview
   c. Provides additional background information not contained in the resume
   d. Becomes a permanent record in personnel when hired

2. Items covered in application forms--share examples

3. Illegal questions on applications and in interviews
   a. Race, color, and national origin
   b. Handicapping conditions
   c. Family/marital status or plans
   d. Arrest record
   e. Sex and age
   f. Father's surname
   g. Origin of foreign language
   h. Previous residence
   i. Military service

B. Resume Development

1. Formats available
   a. Chronological resumes
   b. Functional resumes
   c. Targeted resumes

2. Information that could be included
   a. Name, address, phone number(s)--if living in temporary housing, list permanent address
   b. Career objective
   c. Educational background
   d. Work experience
   e. Personal interests (optional)
   f. Professional organization membership
   g. Leadership roles in organizations
   h. References (may indicate available upon request)
   i. Capabilities
   j. Achievements

JOB INTERVIEWING

TELEMARKETING SPECIALIST

PERSONNEL/HUMAN RESOURCES RELATED

PURPOSE: This unit is designed to assist the participants in developing skills in job interviewing.

OBJECTIVE: Upon completion of this unit, participants will:

* be able to demonstrate skill in job interviewing

ACTIVITIES: Discuss the topics contained in the content outline that is provided.

Invite a guest speaker who is a manager of a telemarketing department, a professional interviewer, or personnel manager to discuss the various points.

Each student should prepare for a mock interview. This can be role played in class, woth either another student or the instructor role playing the interviewer.

Each participant could be assigned the task of setting up an interview with someone in the institution or an outside organization to complete a mock interview. They should make contact with the individual, explain what the purpose of the interview is, complete the interview, and then have the interviewer complete an evaluation of the interview.

EVALUATION: The participants should be able to demonstrate an ability to complete a mock interview, using the techniques and principles discussed in class.

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CONTENT OUTLINE

A. Preparation for the Job Interview

1. Research the company
   a. What does the company do?
   b. Who will do the interviewing?
   c. Find out about the company's customers, products, competitors, etc. if possible.

2. Dress for Success
   a. Professional attire
   b. Shined shoes
   c. Eliminate excess jewelry
   d. Well groomed

3. Make a list of questions to ask in the interview--some examples often asked by job hunters:
   a. What is the principal job of this department?
   b. Describe the duties of the person in this job.
   c. What kind of person are you looking for?
   d. How do the people in the job allocate their time?
   e. What are the most important responsibilities?
   f. Where is the last person(s) that held this position working right now?
   g. What is your biggest problem/challenge?
   h. What role would you like me to play in solving the problem?
   i. To whom would I report?
   j. Who would work for me (where applicable)?
   k. What is the background of my potential supervisor?
   l. Who are the other people I would work with?
   m. What are the job holder's most important relationships--clients, customers, other employees?
   n. Where would I be situated, what kinds of equipment is available?
   o. Are there performance reviews?
   p. What is the outcome of performance reviews?
   q. What kind of schedule do you work?
   r. What professional organizations and publications are important to this position?
   s. What kinds of training are available upon immediate employment and in the future?
   t. What advancement opportunities are available?
   u. What educational and training requirements are needed for advancement?

4. Bring a copy of resume, letter of application, references, transcripts, etc.

5. Think about questions that the interview could ask--some sample questions that are asked by interviewers:
   a. Why would you like to work for this company?
   b. How did you decide on your major in college?
   c. Why did you choose to attend college?(if you did)
   d. What are your career goals?
   e. How are you going to achieve your career goals?
   f. What sets you apart from other people who want this job?
   g. What is your greatest strength?
   h. Your greatest weakness?
   i. Describe your best boss.
   j. What was the biggest challenge you have faced?
   k. How did you overcome that challenge?
   l. What would you like to being doing in ten years?
   m. How much money would you like to be earning in five and ten years?
   n. What qualities do you think are necessary for this position?
   o. What has been your most significant accomplishment in college or your present job?
   p. Describe a typical day in your current job.
   q. What do you know about our organization?
   r. What would you like to know about our organization?
   s. What are your hobbies and interests?
   t. How soon can you start?
   u. Where else are you interviewing?
   v. What starting salary would you expect?

B. The Actual Interview

1. Be on time--show up early.
2. Don't smoke or chew gum during the interview, even if offered by the interviewer.
3. If interviewed during lunch or dinner, watch your manners.
4. Think positive--be enthusiastic, but don't fake it.
5. Control emotions.
6. Watch use of grammar--use professional terms when appropriate.
7. Use a firm handshake.
8. Think before answering questions.
9. Be sure to ask questions when appropriate.
10. Don't address the interviewer by their first name.
11. Avoid jokes, far-out slang, and profanity.
12. Put off questions about salary and benefits until you have an offer or the interviewer brings them up.
13. Avoid coming across as being desperate for a job.
14. Do look at the interview when speaking--make eye contact.
15. If the interviewer is interrupted by a telephone call or a visitor, don't listen in or enter the conversation--don't comment on the interruption--do remember the last topic before the interruption so you can pick up on the conversation.

16. Ask when the company plans to make a decision.
17. Shake hands and thank them for their time.
18. Offer to leave a copy of references and resume.

C. After the Interview

1. Write a letter of follow-up to the interview within 24 hours.
2. Express your reaction to the company, the interviewer, and the interview in positive terms.
3. If it is true, express your interest in working for the company.
4. Thank the interviewer for his/her time.
5. If you receive no response within a couple of weeks, phone the company to check on the status of the position.
6. Don't overdo the phone calls.
7. Don't say you've got an offer when you don't in hopes of forcing a decision--you could be knocked out of the running simply because your timing is off.
8. Keep interviewing with other companies--don't hang your hat on this one job.

EMOTIONAL APPEAL

TELEMARKETING SPECIALIST

PERSONNEL/HUMAN RESOURCES RELATED

PURPOSE: This unit is designed to provide the participants with an understanding of how to appeal to the emotion of people, whether in a selling situation or job interview.

OBJECTIVE: Upon completion of this unit, participants will:

* be able to demonstrate an understanding of how to appeal to the emotions of people

ACTIVITIES: Discuss the topics related to emotional appeal.

Have students role play a selling situation or job interviewing situation to demonstrate their ability to appeal to the emotions of the customer or the interviewer.

EVALUATION: The participants should be able to demonstrate an understanding of how to appeal to the emotions of people.

RESOURCES: None identified specifically.

PROFESSIONAL TRADE JOURNALS

TELEMARKETING SPECIALIST

PERSONNEL/HUMAN RESOURCES RELATED

PURPOSE: This unit is designed to assist participants in developing an understanding for the need to read and understand the various trade jounals available in their professional field.

OBJECTIVE: Upon the completion of this unit, participants will:

* be able to identify the need for reading and understanding professional trade journals

ACTIVITIES: Share with the participants the types of trade journals available in their professional/ career field.

Have students conduct a literature review of trade journals available in their career field. If there are companies locally available that are related to the students' career field, have students make contact with them to obtain listings and possibly copies of trade journals to begin a reference library.

Review the various sections contained in most trade journals so students are familiar with what is available. Stress the importance of reading trade journals on a regular basis to stay up to date in the field.

EVALUATION: The participants should be able to identify the need for reading and understanding professional trade journals.

RESOURCES: None identified specifically.

Reference should be made to a variety of trade journals that would be locally available.

TELEMARKETING

TELEMARKETING SPECIALIST

PERSONNEL/HUMAN RESOURCES RELATED

Additional topics which would be appropriate to cover if time permits include:

1. Worker's compensation
2. Social forces, legal rights, and dispute resolutions
3. Training methods
4. Disciplining employees
5. Compensation
6. Performance appraisal
7. Employment testing
8. Interview techniques
9. Team building
10. First Aid I (health/safety)
11. General psychology
12. Grooming for success
13. Environment design

For purposes of this curriculum guide, only those topics which were indicated to be highly important or of medium importance were included in the curriculum design. Additional topics may be developed in the curriculum as deemed appropriate.

TELEMARKETING

TELEMARKETING SPECIALIST

COMMUNICATIONS AND MINIMUM SKILL TASKS

Several topics were indicated to be necessary for an individual employed in telemarketing in the areas of communication tasks and minimum skill tasks. These topics have not been developed into curriculum guides or content outlines because these topics can be more fully covered as a part of courses such as "Business Communications", "Basic Speech", "Business Mathematics", etc., and offered at the institution by qualified staff.

However, the following topics should be included in the appropriate courses to be sure that individuals who complete this level of training have instruction in these areas. The topics are as follows:

COMMUNICATIONS TASKS

HIGHLY IMPORTANT

1. Business vocabulary
2. Listening techniques
3. Vocal image
4. Communication styles
5. Voice techniques
5. Data recording

MEDIUM IMPORTANCE

1. Written sentence structure
2. Geographic differences in communications (dialects, location)
3. Business letters
4. Physical demonstration
5. Information presentation
6. Discussion/debate
7. Designing/building content for a presentation
8. Arrangement/preparation for a presentation
9. Delivery
10. Interaction/feedback/follow-up
11. Business meetings

RELATED TOPICS

1. Impromptu speech
2. Communication theory
3. Design of manuals

TELEMARKETING

TELEMARKETING SPECIALIST

COMMUNICATIONS AND MINIMUM SKILL TASKS

MINIMUM SKILL TASKS

HIGHLY IMPORTANT

1. Reading
2. Writing
3. Speaking
4. Grammar
5. Spelling

MEDIUM IMPORTANCE

1. Fundamental math processes and records
2. Fractions and decimals
3. Percentages and discounts
4. Written sentence structure